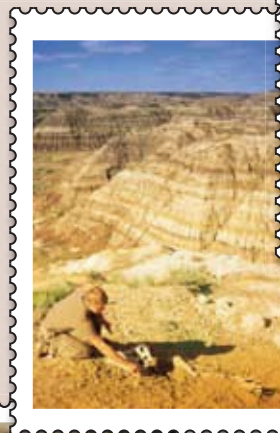


THE AMERICAN MARKET FOR ARCHAEOLOGICAL EXPERIENCES IN ALBERTA



TAMS



A SPECIAL ANALYSIS OF THE 2006 TRAVEL ACTIVITIES AND MOTIVATION SURVEY



The American Market for Archaeological & Palaeontological Experiences in Alberta

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

Presented to

Alberta Tourism, Parks, Recreation and Culture

Presented by

**Research Resolutions
& Consulting Ltd.**



December 2007

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I. Executive Summary

ARCHAEOLOGY & PALAEOLOGY TOURISTS ARE A NICHE MARKET.

American Archaeology & Palaeontology Tourists – those who took overnight trips in the past two years *in order to* visit a palaeontological or archaeological site or participate in an archaeological dig – represent approximately 2.5 million Americans, or between one and two percent of the U.S. pleasure travel market. Of these Archaeology & Palaeontology Tourists, 315,000 (13%) claim to have been to Alberta over the past decade (*U.S. Travellers to Alberta*).

ALBERTA ATTRACTS ARCHAEOLOGY & PALAEOLOGY TOURISTS AT A HIGH RATE.

Archaeology & Palaeontology Tourists have travelled to Alberta over the past decade at a substantively higher rate than would be expected, given their share of the total U.S. pleasure travel market. Of the 166 million Americans in the overnight pleasure travel market, three percent or 5.4 million claim to have been to Alberta over a ten-year period, and as noted above, thirteen percent or approximately 315,000 of the 2.5 million Archaeology & Palaeontology Tourists in the U.S.A. have been to the province over the past decade.

PALAEOLOGICAL AND ARCHAEOLOGICAL SITES ARE ESPECIALLY POPULAR.

Of the two related activities that define the sector, visits to palaeontological or archaeological sites are more popular than are archaeological digs. Almost 9-in-10 Archaeology & Palaeontology Tourists say they took a trip motivated by site visits whereas only about 1-in-4 claim to have taken a trip in order to participate in an archaeological dig.

ARCHAEOLOGY & PALAEOLOGY TOURISTS LIVE IN ALL PARTS OF THE U.S.A.

They are, however, more highly concentrated in the southwestern and Pacific regions of the United States than is the American overnight pleasure travel market as a whole. Specifically, 1-in-5 Archaeology & Palaeontology Tourists live in the Pacific region (20%), one-seventh live in West South Central states (14%) and one-eighth of the niche market segment reside in the eight Mountain states (12%). This concentration in southwestern and western U.S. regions is particularly fortuitous for Alberta because the province tends to be more

successful in attracting visitors from these regions than from the eastern portion of the country.

PALAEONTOLOGICAL AND ARCHAEOLOGICAL TOURISTS TEND TO BE OLDER.

While all age groups are represented in the sector, almost 2-in-5 are between the ages of 18 and 44 years, half this proportion is between 45 and 54 years of age, and 2-in-5 are 55 years of age or older. U.S. Travellers to Alberta are particularly concentrated in the 65-plus age group. Men are somewhat more likely than women to be Archaeology & Palaeontology Tourists.

ARCHAEOLOGY & PALAEONTOLOGY TOURISTS HAVE MORE EDUCATION AND INCOME THAN THE AVERAGE U.S. TOURIST.

Although they span various income, occupational status and education levels, Archaeology & Palaeontology Tourists are generally more affluent and more highly educated than are typical American tourists. Over 1-in-2 are university graduates and more than one-third say they have an annual household income of \$100,000 or more. Close to 4-in-10 live in households with at least one person occupying an executive, managerial or professional position. Commensurate with their older ages, 2-in-10 Archaeology & Palaeontology Tourists indicate that they have retired from the labour force.

MANY ARE INTERNATIONAL TRAVELLERS.

Over one-quarter of American Archaeology & Palaeontology Tourists have been to Canada on a recent overnight pleasure trip (27%) – a level noticeably higher than is the case within the U.S. pleasure travel market as a whole (13%). Not only have Archaeology & Palaeontology Tourists been to *Canada* at a higher rate than most American pleasure travellers, but they have also been to *other countries* at twice the rate: 52% for Archaeology & Palaeontology Tourists compared to 26% for all U.S. overnight pleasure tourists. Because members of this market are so widely travelled, Alberta's archaeological and palaeontological sites are competing with a variety of cultural offerings in Europe and other continents around the world.

ONTARIO IS ALBERTA'S PRINCIPLE CANADIAN COMPETITOR FOR ARCHAEOLOGY & PALAEONTOLOGY TOURISTS.

Over a two-year period, Ontario attracted about three times (16%) as many Archaeology & Palaeontology Tourists as did Alberta (5%). British Columbia attracted Archaeology & Palaeontology Tourists at twice (10%) Alberta's rate.

Ontario's success in this market is most likely a function of its relative proximity to large American populations. Its border states, including New York, Pennsylvania, Ohio, and Michigan, represent over one-seventh of the entire U.S. adult population. Many of these Americans live within an easy drive of Ontario's southern destinations including Toronto and Niagara Falls. In contrast, Alberta's border states represent less than one percent of U.S. adults. Thus, the short-haul rubber tire market for Alberta is relatively small.

ALBERTA FACES COMPETITION FOR ARCHAEOLOGY & PALAEOLOGY TOURISTS FROM MANY U.S. STATES.

In addition to travelling outside the U.S.A., Archaeology & Palaeontology Tourists travel widely *within* the U.S.A. At least one-tenth of them have taken recent overnight pleasure trips to as many as twenty-four (24) states other than the one in which they reside. Their wide and eclectic destination choices when they leave their home state for another U.S. destination likely explain why few states – Florida, Arizona and California – emerge as clear out-of-state destination “winners” for Archaeology & Palaeontology Tourists.

Florida attracted over 1-in-4 Archaeology & Palaeontology Tourists possibly because of sun/sea activities that may attract an older market seeking a warm respite from the winter weather they experience in their homes throughout New England, Mid Atlantic, East and West North Central states. California and Arizona are also popular out-of-state destinations, each attracting 1-in-5 Archaeology & Palaeontology Tourists. These three states contribute to the strong attraction evident for **sun/sea** locations within the U.S. Collectively, these destinations along with Nevada and Hawaii attract two-thirds of Archaeology & Palaeontology Tourists for out-of-state overnight pleasure trips (67%).

Sun/sea states, along with New York, far outpace Alberta within the Archaeology & Palaeontology Tourism market. Consequently, they represent substantive competition for Alberta's sites and digs, particularly in the current climate of passport uncertainty, unfavourable exchange rates and relatively high fuel prices.

A SAFE DESTINATION IS A PRIORITY.

Most Archaeology & Palaeontology Tourists start a trip planning process with a *destination* in mind, although about one-fifth start their planning with a focus on the type of vacation experience they wish to have. The characteristics identified as most important to Archaeology & Palaeontology Tourists in selecting a destination indicate that it should be *safe*, have *many things for adults to see and do*

and offer *convenient access by car*. The level of importance associated with automobile access to the destination suggests that the classic American *road trip* remains alive and well.

For those who take long-haul trips to destinations in Canada, Europe, or Asia, *direct air access* becomes important. Archaeology & Palaeontology Tourists who place a high level of importance on direct air access (33%) are more likely to be in the market for Alberta's archaeology and palaeontology sites and attractions than are those wedded to driving trips (46%) because of Alberta's distance from major U.S.A. cities.

ALBERTA FACES IMAGE BUILDING AND AWARENESS CHALLENGES IN THE AMERICAN ARCHAEOLOGY & PALAEOLOGY TOURISM MARKET.

At 6.4 on a ten-point *appeal as a destination* scale among Archaeology & Palaeontology Tourists, Alberta faces *image-building* challenges. This score is significantly below U.S. market leaders such as Hawaii (8.4), California (7.5), Colorado (7.5) and neighbouring British Columbia (7.4). Alberta's rating also falls below some other Canadian provinces including Ontario (6.9), Quebec (6.7), and Prince Edward Island (6.7).

Awareness-building challenges among Archaeology & Palaeontology Tourists are clearly manifest in the finding that one-third of Archaeology & Palaeontology Tourists refrain from rating Alberta, presumably because they know too little about the province to offer an opinion about its *overall* touristic appeal.

Not surprisingly, American Archaeology & Palaeontology Tourists who have been to the province rate Alberta much more favourably than do those who have not. In fact, direct experience with Alberta's tourism infrastructure boosts the province's appeal rating to 8.5 on the ten-point scale. The stark contrast in impressions of the province between those with and without direct experience highlights the attractiveness of Alberta's tourism products and services for tourists who visit the province. It reinforces the old adages: *experience is the best teacher* or *to know us is to love us*.

ARCHAEOLOGY & PALAEOLOGY TOURISTS ARE OUTDOOR OBSERVERS RATHER THAN ADVENTURERS.

The *outdoor* activity profile of Archaeology & Palaeontology Tourists suggests travellers who are seeking comparatively sedentary experiences and passive interactions with nature. They seem to want to *see nature* rather than to *engage* nature. The outdoor activities that attract at least 1-in-2 of these tourists on an *any participation* basis are limited to going to well-known natural wonders, nature

parks, and viewing flora or fauna. Fewer include camping, sunbathing or sitting on a beach, swimming in oceans, taking day hikes, fishing, snorkelling, boating and swimming in fresh water among their trip activities.

By and large, U.S. travellers who have visited Alberta in the past decade are likely to participate in the *same* types of outdoor activities as are sector members as a whole. These activities include those that are widely available within the province - going to parks such as Banff, Jasper or Waterton Lakes National Park, seeing well-known natural wonders such as the Canadian Badlands, viewing wildlife, camping and/or taking day hikes.

THEY TAKE TRIPS FOR MANY CULTURAL AND ENTERTAINMENT EXPERIENCES.

Archaeology & Palaeontology Tourists travel to engage in a wide variety of cultural and entertainment activities. For example, approximately 9-in-10 sector members took recent holidays primarily to go to historic sites. Close to half took a trip to stroll around a city to see architecture and more than one-third did so primarily to go to a general history museum or an amusement park.

Approximately 3-in-10 were motivated to travel primarily to attend a spectator sporting event, visit an aquarium, an art gallery, or a science and technology museum. For about 1-in-4 Archaeology & Palaeontology Tourists, recent trips were primarily driven by interests in Aboriginal culture, zoos, gambling (casino), performing arts such as live theatre or music concerts, and/or military museums.

THE INTERNET IS “THE” TRIP PLANNING TOOL FOR ARCHAEOLOGY & PALAEONTOLOGY TOURISTS.

They are information hungry. Eight-in-ten use the internet as a source of trip planning information, two-fifths rely on newspaper articles or official travel guides or brochures from provincial, state or national organizations, and at least one-third include visitor information centres, auto clubs and travel agents among their information sources. Possibly because Archaeology & Palaeontology Tourists are more apt to travel to many distant and often exotic destinations, they rely on more information sources than does the U.S. travelling public as a whole.

CATER TO THEIR ECLECTIC AND WIDE-RANGING INTERESTS.

Archaeology & Palaeontology Tourists describe themselves as tourists who want to return home from their trips having *seen and done something new and different* and having obtained *knowledge of history, culture and places*. Thus, when marketing Alberta's sites and digs to them, consider a *menu* that highlights Alberta's *other* historic, cultural and entertainment attractions including well-known historic sites, architectural walking tours of cities, general history and science and technology museums, art galleries and Aboriginal cultural sites or events.

On the lighter side and to provide evening entertainment, the menu might also include spectator sporting events, casinos, fireworks displays, and theatre or music performances. Remind them of Alberta's tourism amenities that would support the basic archaeology or palaeontology theme of their trip. Such amenities might include shopping, restaurants offering local cuisine and local outdoor cafes.

ECONOMIC CONDITIONS AND BORDER ISSUES MAKE ARCHAEOLOGY & PALAEOLOGY TOURISTS DIFFICULT TO ATTRACT.

Attracting *any* American tourists to Alberta or other Canadian destinations continues to be impeded by unfavourable economic conditions (e.g., fuel prices for automobiles and airlines, exchange rates, the "sub-prime mortgage crisis" in the U.S.) and persistent confusion about passport requirements and border controls.

As seasoned travellers, Archaeology & Palaeontology Tourists can elect to travel within the U.S.A. or they can select foreign destinations that may provide them with the archaeological or palaeontology experiences they seek without the price-value or border concerns they may associate with a trip to Alberta. And they **DO** elect to travel widely within the U.S.A. and to other countries, creating a formidable competitive environment for Alberta.

IN MANY RESPECTS, ARCHAEOLOGY & PALAEOLOGY TOURISTS ARE DREAMTOURISTS.

Many members of this sector are affluent, literate, educated, engaged, older, well travelled, reliant on many sources of information but especially the internet, and interested in many different types of experiences including those in which Alberta excels. They are also concentrated in the southwestern and western regions of the U.S., putting them in Alberta's traditional catchment area.

Perhaps because they have the resources and interests to allow them to travel *anywhere* for various cultural, outdoor and/or entertainment reasons, Archaeology & Palaeontology Tourists are likely inundated with promotional materials from a wide variety of destinations, all competing for their booking. In other words, many destinations are likely fighting for Archaeology & Palaeontology Tourists' attention.

Efforts to cut through this clutter are required to increase the awareness and image of Alberta, making it *the place* to visit for an archaeological or paleontological experience. Some suggestions, based on the TAMS findings summarized in this report, are listed below.

- Highlight the **unique** and **unusual** characteristics of the Royal Tyrrell Museum, the Canadian Badlands and other paleontological and archaeological sites in Alberta.
- Package archaeology-oriented attractions with *low energy* engagements with the **outdoors** (natural wonders, national/provincial parks) and a variety of cultural activities such as architectural tours, historic sites, general history or science/technology museums and/or art galleries. Let Archaeology & Palaeontology Tourists know there are entertainment options such as casinos, amusement parks and spectator sporting events to fill their evenings.
- Offer a range of **amenities** including mid-range accommodation, restaurants featuring local cuisine, outdoor cafes, and shopping.
- Use the **internet, newspapers, and official travel guides or brochures** from regional, provincial or national organizations to reach this market sector.
- Encourage Alberta's tourism businesses and Destination Marketing Organizations to retain contact with *past visitors* via electronic and print messages, thereby retaining these tourists as ambassadors for Alberta among their friends and relatives.

II. 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 Americans 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 activity-based sectors as the focus of a series of American tourist profiles based on the recently released 2006 Travel Activities and Motivation Survey (TAMS).¹

- Cultural Tourists
- Fairs & Festivals Tourists
- Hunters
- Archaeological & Palaeontological Tourists

ATPRC commissioned Research Resolutions & Consulting Ltd. to prepare the American tourist profiles. This profile describes **Archaeological & Palaeontological Tourists**. The niche segment is included in the larger group of *Cultural Tourists*, described in a separate report entitled *The American Market for Cultural Tourism in Alberta* (available from ATPRC).

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

B. Defining American Archaeology & Palaeontology Tourists

This report provides information about **American Archaeology & Palaeontology Tourists**. These individuals are defined to include American 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 *palaeontological/archaeological sites* and/or *archaeological digs* was the *main reason* for at least one of the overnight trips they took during this time period.²

The focus of this report is on Archaeology & Palaeontology Tourists as a whole. The summary tables provided in each section include findings for the subset of this market with travel experiences *in Alberta* over the past decade³ (*U.S. Travellers to Alberta*), but the small base size of this subset precludes detailed analysis.

People who take a trip *in order to go* to an archaeological site or dig are only a fraction of tourists who visit these types of sites while on their vacations. In fact, approximately 9.3 million Americans say they have gone to these types of sites on at least one of their trips over a two-year period.

Of these American pleasure tourists, over one-quarter or about 2.5 million (27%) say they took a trip *in order to go* on an archaeological dig or visit a palaeontology/archaeology site. These enthusiasts – those for whom archaeology or palaeontology 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 these activities.

Note to Readers

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

In other words, American Archaeology & Palaeontology Tourists claim to have taken an overnight trip motivated by palaeontological/archaeological interests or an archaeological dig 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, Archaeology & Palaeontology Tourists may or may not have been at a dig or site in a particular country, province or state they have visited recently for an overnight pleasure trip.

² 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.

³ 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.

C. Setting the Stage – U.S. Travellers to Alberta

Tourism businesses in Alberta are competing for the attention of about 166 million American adults who are in the market for overnight vacations (see Table 1). These individuals claim to have taken at least one overnight pleasure or vacation trip over a two-year period. They represent three-quarters of the 222.8 million adults who live in the U.S.A.

Three percent of the American overnight pleasure travel market, or about 5.4 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. Of these U.S. Travellers to Alberta over the past ten years, close to half claim to have visited Alberta in the past two years or so (2.0 million). Most of these recent visitors to the province were on a pleasure or vacation trip (1.5 million).

TABLE 1: OVERVIEW OF ALBERTA'S MARKET SIZE	U.S. Pleasure Travellers Any Destination – Past 2 Years	
Unweighted base	(45,697)	
Weighted, Projected	166,003,000	
<u>Overnight Trips to Alberta</u>		
Any purpose, past 10 years	5,405,000	3%
Any purpose, past 2 years	2,021,000	1%
Pleasure, past 2 years	1,459,000	1%

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

III. Market Profile: American Archaeology & Palaeontology Tourists

A. Market Segments

The sector is composed of pleasure tourists who indicated that *palaeontological/archaeological sites* and/or *archaeological digs* was the *main reason* for at least one of the overnight trips they took over a two-year period. These overnight pleasure tourists represent approximately one percent of *all* American adults (1%) and between one and two percent of the U.S. overnight pleasure travel market, or 2.5 million people. Archaeology & Palaeontology Tourists are found at twice the rate (6%) among the 5.4 million Americans who have been to Alberta over the past decade as is the case among *all* U.S. overnight pleasure tourists (3%).⁴

Of the two related activities, visits to palaeontological/archaeological sites are the more popular (see Table 2). Almost 9-in-10 Archaeology & Palaeontology Tourists say they took a trip motivated by site visits whereas only about 1-in-4 claim to have taken a trip primarily to participate in an archaeological dig.

TABLE 2: ARCHAEOLOGICAL EXPERIENCES AS MAIN REASONS FOR OVERNIGHT TRIPS

	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Palaeontological/archaeological sites	88%	85%	88%
Archaeological digs	23%	24%	23%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 2. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade. ¹Caution: small base size. Figures add to more than 100% because of duplication between the two activities' participants.

⁴ See Detailed Tables, Volume 1, Tables 1 and 3 for figures.

B. Regional and Demographic Characteristics

1. Place of Residence

Archaeology & Palaeontology Tourists' place of residence by U.S. Census Regions, individual states and key metropolitan areas is displayed in Table 3. For a list of the states included in each of the U.S. Census Regions, please refer to Appendix C.

Archaeology & Palaeontology Tourists live in almost every state. They are, however, more highly concentrated in the southwestern and Pacific regions of the United States than is the adult population and the American overnight pleasure travel market as a whole. In turn, Archaeology & Palaeontology Tourists are somewhat under-represented in the north eastern and central portions of the country.

Specifically, 1-in-5 Archaeology & Palaeontology Tourists live in the Pacific region (20%) whereas about 1-in-6 U.S. pleasure travellers in total live in these states (16%). West South Central and Mountain states are also prime markets for Archaeology & Palaeontology Tourists. One-seventh of Archaeology & Palaeontology Tourists live in West South Central states (14%), compared to one-tenth of all U.S. pleasure travellers (11%). Similarly, one-eighth of the niche market reside in the eight Mountain states (12%) compared to less than one-twelfth of American overnight pleasure travellers as a whole (7%). The concentration of Archaeology & Palaeontology Tourists in southwestern and western U.S. regions is particularly fortuitous for Alberta because the province tends to be more successful in attracting visitors from these regions than from the eastern portion of the country.

By virtue of the size of their resident populations, **California** (17%) and **Texas** (10%), followed by **Florida** and **New York** (5%, each) are the largest single state contributors to the Archaeology & Palaeontology Tourism market.

Most of the urban areas noted in Table 3 contribute to the market for Archaeology & Palaeontology Tourists. Los Angeles is the single biggest urban source of these tourists, contributing just over 1-in-20 travellers to this sector (6%). It is followed at a considerable distance by New York City, Chicago and Houston (3% each) and San Jose, California (2%).

TABLE 3: PLACE OF RESIDENCE	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
New England	3%	3%	3%
Massachusetts	1%	*	1%
Connecticut	1%	3%	1%
Hartford	1%	3%	1%
New Haven MSA	*	*	*
Middle Atlantic	10%	7%	11%
New York State	5%	3%	6%
New York City	3%	2%	4%
Pennsylvania	3%	1%	3%
New Jersey	2%	3%	2%
Newark	*	*	*
East North Central	10%	8%	11%
Illinois	4%	4%	3%
Chicago	3%	4%	2%
Michigan	3%	2%	3%
Detroit	1%	1%	1%
Ohio	2%	*	3%
West North Central	7%	9%	7%
Minnesota	2%	3%	2%
Missouri	2%	2%	2%
South Atlantic	16%	11%	17%
Florida	5%	4%	5%
Georgia	3%	3%	3%
North Carolina	2%	*	2%
Virginia	3%	*	3%
East South Central	7%	8%	7%
West South Central	14%	15%	14%
Texas	10%	13%	9%
Dallas	1%	*	1%
Houston	3%	8%	2%
Mountain	12%	14%	11%
Colorado	3%	4%	3%
Arizona	2%	1%	3%
Utah	2%	*	2%
Nevada	2%	*	2%
New Mexico	1%	2%	1%
Pacific	20%	24%	20%
California	17%	14%	17%
Los Angeles	6%	4%	6%
San Francisco	1%	*	1%
Sacramento	1%	2%	1%
San Diego	1%	1%	1%
San Jose	2%	1%	2%
Washington	2%	6%	1%
Oregon	2%	4%	1%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 44. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade. *Less than 0.5%. ¹Caution: small base size.

2. Personal and Household Characteristics

Age & Gender

Every age group is represented among Archaeology & Palaeontology Tourists, but these tourists are concentrated at the older end of the age spectrum. Almost 2-in-5 are between the ages of 18 and 44 years (38%), half this proportion is between 45 and 54 years of age (21%) and 4-in-10 are 55 years of age or older (see Table 4). U.S. Travellers to Alberta are noticeably more likely to be 65-plus (35%) than are Archaeology & Palaeontology Tourists as a whole (18%).

Men (53%) are somewhat more prevalent than women (47%) among Archaeology & Palaeontology Tourists.

TABLE 4: AGE & GENDER	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Age			
18 – 24 Years	10%	5%	10%
25 – 34 Years	14%	13%	14%
35 – 44 Years	14%	6%	16%
45 – 54 Years	21%	17%	21%
55 – 64 Years	23%	24%	23%
65+ Years	18%	35%	16%
Gender			
Men	53%	45%	54%
18 – 34 Years	12%	11%	12%
35 – 54 Years	19%	11%	20%
55+ Years	22%	23%	22%
Women	47%	55%	46%
18 – 34 Years	12%	7%	13%
35 – 54 Years	16%	12%	17%
55+ Years	19%	36%	17%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 40. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade.¹ Caution: small base size.

Race, Education, Occupation, and Income

Almost all American Archaeology & Palaeontology Tourists, like tourists who live in the U.S.A. as a whole, are Caucasian (see Table 5). Although they span various income, occupational status and education levels, these tourists are generally more affluent and more highly educated than are typical American tourists.

- Over 1-in-2 are university graduates (52%), compared to about 2-in-5 U.S. pleasure tourists as a whole (39%).
- About one-third claim annual household incomes under \$60,000 (US) (36%), a further one-quarter are in the \$60,000 to under \$100,000 income bracket (27%), but over one-third say they have an annual household income of \$100,000 or more (37%). Among *all* U.S. pleasure tourists, only 1-in-4 fall within this high income bracket.
- Close to 4-in-10 live in households with at least one person occupying an executive, managerial or professional position (38%). Commensurate with their older ages, 2-in-10 Archaeology & Palaeontology Tourists indicate that they have retired from the labour force (20%).

Given their concentration in the 65-plus age group, it is not surprising that U.S. Travellers to Alberta are more likely to be retirees (31%) than are Archaeology & Palaeontology Tourists as a whole (20%).

TABLE 5: RACE, EDUCATION, OCCUPATION, INCOME	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Race			
Caucasian	88%	84%	88%
African American	2%	1%	2%
Asian American	3%	7%	2%
Other/Not stated	8%	7%	8%
Education			
High school diploma or less	13%	14%	13%
Some post-secondary	23%	21%	23%
Post-secondary diploma or certificate	9%	6%	10%
University degree+	52%	51%	52%
Labour Force Participant²			
Retirees	20%	31%	18%
Executive/Manager /Professional ³	38%	35%	38%
Household Income			
Under \$40,000	20%	11%	21%
\$40,000 - \$59,999	16%	19%	16%
\$60,000 - \$99,999	27%	40%	25%
\$100,000 - \$149,999	22%	20%	22%
\$100,000+	37%	31%	38%
\$150,000+	16%	11%	16%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 36/39. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade. ¹Caution: small base size. ²Labour force participant² includes working full-time, part-time and self-employed. ³Male or female head of household.

3. Lifestage

Since lifestage is closely linked to an individual's age, it is not surprising that with two-fifths of Archaeology & Palaeontology Tourists in the 55-plus age group, these tourists are concentrated among *older parents* (28%) and, less commonly, among *working* (18%) or *retired older couples* (15%) (see Table 6). Consistent with their older ages, U.S. Travellers to Alberta are more heavily concentrated among *retired older couples* (32%) than are Archaeology & Palaeontology Tourists as a whole.

On average, Archaeology & Palaeontology Tourists live in households of just under three people (2.8).

TABLE 6: HOUSEHOLD CHARACTERISTICS	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
HOUSEHOLD SIZE			
1 person	13%	9%	14%
2 people	44%	54%	43%
3 person	15%	21%	14%
4 people	14%	9%	14%
5+ people	14%	7%	15%
Average (all ages)	2.8	2.6	2.8
LIFESTAGE²			
Young singles	3%	1%	3%
Middle singles	8%	6%	8%
Older singles	3%	2%	3%
Young couple	10%	11%	10%
Working older couple	18%	20%	17%
Retired older couple	15%	32%	13%
Young parent	5%	2%	6%
Middle parent	7%	2%	8%
Older parent	28%	24%	29%
Any singles	13%	9%	14%
Any couples	43%	64%	40%
Any parent	41%	27%	43%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 41, 43. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade. ¹Caution: small base size. ²Lifestage definitions are provided in Appendix D. No cross editing with other household composition variables was performed by Research Resolutions. Percentages do not add to 100% because some respondents refrained from answering the question.

IV. 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, virtually all Archaeology & Palaeontology Tourists indicated that they have taken recent vacations within the U.S.A. (see Table 7). Within the U.S. travel market at large, 2-in-3 Americans claim to have travelled *only* within their own country in the past two years (67%). In contrast, only about two-fifths of Archaeology & Palaeontology Tourists claim to have travelled *only* within their own country (39%).

Over one-quarter of American Archaeology & Palaeontology Tourists have been to Canada on a recent overnight pleasure trip (27%). This level of travel to Canada is noticeably higher than is the case within the U.S. pleasure travel market as a whole (13%), suggesting that Canada has a particular appeal for these enthusiasts.⁵

Not only have Archaeology & Palaeontology Tourists been to *Canada* at a higher rate than most American pleasure travellers, but they have also been to *other countries* at twice the rate: 52% for Archaeology & Palaeontology Tourists compared to 26% of all U.S. overnight pleasure tourists. At least one-fifth of them claim to have taken an overnight pleasure trip to Mexico, the Caribbean, and/or Europe over the past two years. In fact, Archaeology & Palaeontology Tourists have been equally likely to select European and Canadian destinations over the past two years, suggesting that Alberta's archaeological and palaeontological sites are competing with a variety of cultural offerings in Europe and other continents around the world.

Willingness to travel to destinations *outside* the U.S.A. is especially evident among U.S. Travellers to Alberta. Three-in-five of these tourists have recently travelled in Canada (59%) while over 2-in-5 have been to Europe in the past two years or so.

Note to Readers

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

In other words, American Archaeology & Palaeontology Tourists claim to have taken an overnight trip motivated by palaeontological/archaeological interests or an archaeological dig 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, Archaeology & Palaeontology Tourists may or may not have been at a dig or site in a particular country, province or state they have visited recently for an overnight pleasure trip.

⁵ See Detailed Tabulations, Volume 1, Table 49 for *all U.S. overnight pleasure traveller* figures.

TABLE 7: COMPETITIVE DESTINATIONS
WORLDWIDE*

	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Canada	27%	59%	23%
U.S.A.	99%	99%	99%
Other Countries (NET)	52%	67%	50%
Mexico	23%	28%	22%
Caribbean	20%	26%	19%
Europe	27%	43%	25%
South/Central America	12%	18%	11%
Asia	7%	13%	6%
Africa	4%	14%	3%
Australia/New Zealand	4%	14%	3%
Destination patterns			
Only U.S.A.	39%	13%	43%
U.S.A. & Canada only	9%	19%	8%
U.S.A. & Mexico only	5%	3%	6%
U.S.A. & Canada & Other Countries	18%	40%	15%
U.S.A. & Other Countries only (not Canada or Mexico)	20%	17%	21%

Source: TAMS U.S. Special Tabulations. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade.

¹Caution: small base size.

B. Canadian Destinations

Approximately 1-in-8 Archaeology & Palaeontology Tourists have had some travel experience in Alberta over a ten-year period (13%), but appreciably fewer (5%) 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 for the sector as a whole (5%). These recent U.S. Travellers to Alberta may or may not have visited an archaeological or palaeontological site in Alberta or any other specific destination they claim to have visited recently.

Ontario is the principle Canadian competitor for Archaeology & Palaeontology Tourists. Over a two-year period, this central Canadian province attracted about three times as many Archaeology & Palaeontology Tourists (16%) as did Alberta (5%). British Columbia (10%) also attracts Archaeology & Palaeontology Tourists at a higher rate than does Alberta. In fact, British Columbia is as popular a destination for a recent pleasure trip (38%) as is Alberta (36%) among those who have been to Alberta over the past decade.

Ontario's success in this market is most likely a function of its relative proximity to large American populations. Its border states, including New York, Pennsylvania, Ohio, and Michigan, represent over one-seventh of the entire U.S. adult population. Many of these Americans live within an easy drive of Ontario's southern destinations including Toronto and Niagara Falls. In contrast, Alberta's border states represent less than one percent of U.S. adults. Consequently, the short-haul rubber tire market for Alberta is relatively scarce.⁶

Archaeology & Palaeontology Tourists take trips for a wide variety of outdoor, cultural and entertainment purposes. Thus, although they go to Ontario at a higher rate than they visit Alberta, these tourists do not necessarily visit Ontario for its archaeological product.

For additional information on the relative appeal of Alberta and British Columbia among residents of Pacific states, please see the following page.

⁶ See Detailed Tabulations Volume 1, Table 44 for population figures for Montana, Idaho and other states.

A Comparison of All Pacific Region U.S. Tourists Who Have Taken Trips to Alberta and British Columbia

Although there are differences in how the groups are defined, the figures displayed in the table below for *all* American tourists including those who take trips motivated by archaeology and palaeontology clearly suggest that:

- Alberta is more successful at attracting generic visitors from the Pacific Region (26%), and most particularly California (17%) and Washington (6%) than would be expected based on the size of the traveller populations in these areas;
- The province has been about equally successful in attracting Archaeology & Palaeontology Tourists from the Pacific region (24%) as it has been in drawing *generic* tourists from this region (26%); and
- British Columbia is appreciably more successful than is Alberta in capturing generic market share from the Pacific Region (50%) and most particularly from California (24%) and neighbouring Washington State (20%).

	All U.S. Pleasure Travellers to . . .			U.S. Archaeology & Palaeontology Tourists to Alberta (past 10 years) ⁸
	Any Destination (past 2 years)	British Columbia (past 2 years) ⁷	Alberta (past 10 years)	
PLACE OF RESIDENCE				
Pacific Region	16%	50%	26%	24%
California	13%	24%	17%	14%
Washington	2%	20%	6%	6%
Oregon	1%	Not Available	3%	4%

⁷ Source: Tourism BC, *Travel Activities and Motivations of U.S. Visitors to BC: Activity Profile*.

Focus on History & Heritage Tourists, July 2007. Available on Tourism BC's website (www.tourismbc.com).

⁸ Caution: small base size.

TABLE 8: CANADIAN DESTINATIONS*	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Alberta			
Any purpose, past 10 years	13%	100%	-
Any purpose, past 2 years	6%	45%	-
Pleasure, past 2 years	5%	36%	-
Overnight Pleasure Trips in Past 2 Years to . . .			
Atlantic Canada	5%	16%	3%
Quebec	7%	13%	6%
Ontario	16%	25%	14%
Man/Sask	3%	20%	*
British Columbia	10%	38%	6%
Yukon	3%	13%	1%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 1 and 49. *Locations visited on overnight pleasure trip, past two years. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade.

¹Caution: small base size.

C. Out-of-State U.S. Pleasure Travel Destinations

To identify Alberta's *competitive* destinations *within* the U.S.A., this analysis focuses on the "other" states Archaeology & Palaeontology Tourists elect to visit for overnight pleasure trips. Thus, Table 9 displays destinations in states other than the one in which an Archaeology & Palaeontology Tourist lives. Limited information on state destinations of these travellers including the one in which they live is available on the following page.⁹

Archaeology & Palaeontology Tourists and the U.S. Travellers to Alberta subset of this market are widely travelled *within* the U.S.A. At least one-tenth of them have taken overnight pleasure trips to as many as twenty-four (24) *other* states over the two-year period. Their wide and eclectic destination choices when they leave their home state for another U.S. destination likely explain why few states – Florida, Arizona and California – emerge as clear "winners" as out-of-state destinations for Archaeology & Palaeontology Tourists.

Florida attracted over 1-in-4 Archaeology & Palaeontology Tourists (27%) possibly because of the sun/sea activities available in this state. California and Arizona are also popular out-of-state destinations, each attracting 1-in-5 Archaeology & Palaeontology Tourists. These three states contribute to the strong attraction evident among sector members for **sun/sea** locations within the U.S. Collectively, these destinations, along with Nevada and Hawaii, attract two-thirds of Archaeology & Palaeontology Tourists for out-of-state overnight pleasure trips (67%).

The popularity of sun/sea destinations among Archaeology & Palaeontology Tourists is consistent with their comparatively *low key, low energy* outdoor activity preferences including sitting on a beach or swimming in oceans (see Section V.B.2 for outdoor activities). In turn, Nevada's particular appeal is undoubtedly associated with some Archaeology & Palaeontology Tourists' interest in gambling as a trip activity.

To assess the impact of state residents travelling *within* their own state, the U.S. destination choices of Archaeology & Palaeontology Tourists are shown on the following page, *excluding* and *including* state residents for the U.S. market leaders. Not surprisingly, because of California's sheer size and rich tourism product base, the impact of including state residents is most obvious for this state.

When residents are included, California captures over one-third of Archaeology & Palaeontology Tourists for overnight pleasure trips, about on par with Florida (31%). Texas also attracts a more sizeable market share when state residents are included

⁹ For the full list of states visited, see Detailed Tabulations, Volume 1, Table 49.

(20%). Based on these findings, it seems clear that Alberta will face considerable challenges within this market from numerous states that attract at least one-fifth of the resident and non-resident Archaeology & Palaeontology Tourist market. These states include California, Florida, Arizona, New York, and Texas.

**Archaeology & Palaeontology Tourists
State Residents . . .**

<u>Destinations</u>	<u>Excluded</u>	<u>Included</u>¹⁰
Florida	27%	31%
Arizona	22%	25%
California	21%	35%
Nevada	19%	19%
New York	19%	23%
Colorado	17%	19%
Washington, D.C.	17%	17%
Illinois	16%	17%
Utah	14%	15%
Georgia	13%	14%
Hawaii	13%	13%
Texas	13%	20%
Pennsylvania	12%	13%
Tennessee	12%	13%
Virginia	12%	14%

¹⁰ See Detailed Tabulations, Volume 1, Table 49.

TABLE 9: OUT-OF-STATE U.S. DESTINATIONS*
(Excluding "Own State")

	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Sun/Sea States (S)	67%	74%	66%
<i>In rank order by Archaeology & Palaeontology Tourists</i>			
Florida (S)	27%	38%	26%
Arizona (S)	22%	38%	20%
California (S)	21%	33%	19%
Nevada (S)	19%	23%	18%
New York	19%	30%	18%
Colorado	17%	31%	15%
Washington, D.C.	17%	27%	16%
Illinois	16%	20%	16%
Utah	14%	24%	12%
Georgia	13%	22%	11%
Hawaii	13%	18%	12%
Texas (S)	13%	23%	11%
Pennsylvania	12%	20%	11%
Tennessee	12%	21%	11%
Virginia	12%	20%	11%
Missouri	11%	13%	11%
North Carolina	11%	13%	11%
Indiana	10%	12%	9%
Massachusetts	10%	23%	8%
Michigan	10%	14%	10%
Montana	10%	27%	8%
South Carolina	10%	15%	9%
Washington State	10%	30%	7%
Wyoming	10%	24%	8%
Wisconsin	10%	21%	8%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 50. *Out-of-state locations visited on overnight pleasure trip, past two years. States displayed represent destinations visited by at least 10% of Archaeology & Palaeontology Tourists. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade.¹ Caution: small base size.

D. Destinations: Roles & Ratings

1. Importance of Destination

For two-thirds of U.S. Archaeology & Palaeontology Tourists, the first consideration in planning their most recent summer and/or winter trip was **destination** (see Table 10). At the same time, about one-fifth of these tourists started their trip planning process with a focus on the **type of vacation experience** they wished to have (21%), or less commonly, with the **activities** they wanted to enjoy while on their trip (16%).

These levels of experience-driven and activity-driven planning are about on par with the American overnight pleasure travel market as a whole. Archaeology & Palaeontology Tourists also put a premium on **destination choice** *per se*, with 7-in-10 claiming that it is *extremely* or *very important* to them (72%). An even higher level of importance is accorded destination *per se* by the subset of these tourists who have visited Alberta over the past decade (85%).

TABLE 10: CONSIDERATIONS/ IMPORTANCE OF DESTINATION

	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
First Consideration for Most Recent Summer/Winter Trip (NET)*			
Start with destination	66%	72%	65%
Start with type of vacation experience	21%	19%	21%
Start with activities	16%	14%	16%
Look for package deal	3%	3%	3%
Importance of Destination			
Extremely/Very Important (SUM)	72%	85%	70%
Extremely important	41%	50%	40%
Very important	31%	35%	30%
Average**	4.1	4.3	4.0

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 24, 26. *Based on respondents who reported taking a summer and/or winter overnight pleasure trip in past two years. Percentages for "first consideration" do not add to 100% because not all response categories are shown. **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 all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade.¹Caution: small base size.

2. 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.¹¹

On balance, Archaeology & Palaeontology Tourists and U.S. Travellers to Alberta within the sector resemble American overnight pleasure travellers as a whole in terms of the conditions they accord *high importance* when selecting a destination (see summary table, following page). Like other American tourists, members of this sector put *feeling safe* (67%) at the top of their list (see Table 11).

Three-fifths of them seek a destination with *many things for adults to see and do* (61%), while approximately half want *convenient access by car* to their destination (46%). This level of interest in automobile access suggests that the classic American *road trip* remains alive and well for many of these tourists. Their destination choices support the importance of being able to drive to a destination. For example, they tend to travel within their own state or region and, if they live near the Canada-U.S.A. border, to the nearest province.¹²

Two-fifths also place high importance on a destination that poses *no health concerns* (41%) and about one-third seek destinations offering *mid-range lodging, direct access by air*, and/or *information on the internet*.

Note that the importance accorded varying grades of lodging, from campsites and budget lodging through luxury accommodation, reflects the diversity of the market. While many of these tourists have higher-than-average education and income levels, there are less educated and less affluent travellers among them. For example, 1-in-5 Archaeology & Palaeontology Tourists have annual household incomes under \$40,000. However, these relatively low income Americans tend *not* to be those who have travelled to Alberta.

¹¹ “Highly important”, “Somewhat important”, and “Of no importance”.

¹² 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?*

Summary: Considerations Deemed *Highly Important* By At Least 1-in-3

	Archaeology & Palaeontology Tourists	All U.S. Pleasure Tourists
Feeling safe	67%	73%
Lots for adults to see/do	61%	48%
Convenient access by car	46%	51%
No health concerns	41%	43%
Mid-range accommodation	36%	33%
Direct access by air	33%	26%

U.S. Travellers to Alberta resemble Archaeology & Palaeontology Tourists as a whole in terms of the conditions they deem highly important in their destination choices. They are, however, somewhat less interested in *budget lodging* and put more emphasis on a destination's ability to provide *direct air access* than are Archaeology & Palaeontology Tourists in total. Because they tend to be older than the sector as a whole, U.S. Travellers to Alberta are also relatively unconcerned about whether a destination offers activities for children and, possibly because they are more adventuresome, about being familiar with the language and culture of their destinations.

TABLE 11: CONDITIONS FOR SELECTING A DESTINATION

	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
<i>Bold rows are proportion stating "Highly Important". In rank order by Archaeology & Palaeontology Tourists</i>			
Feeling safe	67%	71%	66%
Of no importance	3%	2%	4%
Lots for adults to see/do	61%	65%	61%
Of no importance	4%	5%	4%
Convenient access by car (to destination)	46%	50%	46%
Of no importance	13%	9%	13%
No health concerns	41%	50%	40%
Of no importance	18%	5%	19%
Mid-range accommodation	36%	43%	35%
Of no importance	10%	9%	11%
Direct access by air (to destination)	33%	44%	32%
Of no importance	21%	12%	22%
Information available on internet	30%	28%	30%
Of no importance	24%	23%	24%
Budget accommodation	28%	14%	30%
Of no importance	24%	26%	24%
Low cost packages available	27%	30%	27%
Of no importance	24%	21%	24%
Very different culture than own	21%	20%	21%
Of no importance	27%	16%	29%
Familiar with culture & language	17%	10%	18%
Of no importance	23%	32%	22%
Lots for children to see/do	15%	8%	16%
Of no importance	66%	83%	64%
Great shopping	13%	7%	14%
Of no importance	41%	53%	39%
Luxury accommodation	13%	15%	13%
Of no importance	49%	45%	50%
Convenient access by train/bus (to destination)	13%	18%	12%
Of no importance	42%	35%	43%
Have friends or relatives there	11%	5%	11%
Of no importance	66%	72%	65%
Camping	13%	11%	13%
Of no importance	58%	51%	59%
Disabled-person-friendly	9%	4%	10%
Of no importance	72%	75%	72%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 27. **Bold rows** are proportion stating "Highly Important". "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade. ¹Caution: small base size.

3. Appeal of Various Destinations

American Archaeology & Palaeontology Tourists are most enthusiastic about Hawaii as an *appealing destination* for pleasure travel. They accord this tropical state a rating of 8.4 on a ten-point scale (see Table 12).¹³ Though significantly lower than Hawaii's, moderately favourable ratings are accorded a host of destinations, including California (7.5), Colorado (7.5), and British Columbia (7.4), followed by Florida (7.1) and Arizona (7.0). At 6.4 among Archaeology & Palaeontology Tourists, **Alberta** is rated significantly below these states and neighbouring British Columbia. Alberta also trails New York, Ontario, Prince Edward Island and Quebec. Furthermore, one-third of U.S. Archaeology & Palaeontology Tourists refrain from rating the province, presumably because they know too little about Alberta to offer an opinion about its touristic appeal.

Compared to *all* U.S. pleasure tourists, Archaeology & Palaeontology Tourists are more favourably disposed to Alberta (5.2 for *all* versus 6.4 for *sector members*) and for every other Canadian destination, likely reflecting Archaeology & Palaeontology Tourists' more widespread experience with Canadian destinations over the past two years (27%) than is the case for *all* American pleasure travellers (13%).¹⁴

Summary: Highest Appeal Destinations

	Archaeology & Palaeontology Tourists	All U.S. Pleasure Tourists
Hawaii	8.4	8.4
California	7.5	7.3
Colorado	7.5	7.1
British Columbia	7.4	6.2
Florida	7.1	7.3
Arizona	7.0	6.6
New York State	6.9	6.6
Ontario	6.9	6.1
Prince Edward Island	6.7	5.6
Quebec	6.7	5.8
Nova Scotia	6.6	5.5
Alberta	6.4	5.2

¹³ 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. Many potential tourists refrained from offering opinions about the Canadian destinations included in this question, presumably because they did not have sufficient information about the destination to form a clear image.

¹⁴ See Table 49 for figures.

Direct experience with Alberta clearly has an impact on perceptions of the province as a destination. Among U.S. Travellers to Alberta, the province achieves a rating of 8.5, positioning it on par with Hawaii and ahead of all other states, provinces and territories rated by *all* Archaeology & Palaeontology Tourists. The challenge, of course, is in getting more of these enthusiasts to the province!

TABLE 12: APPEAL OF VARIOUS DESTINATIONS

	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
<i>Bold rows are average ratings*</i>			
Alberta	6.4	8.5	5.9
No rating provided	32%	1%	36%
Newfoundland & Labrador	5.9	6.9	5.7
No rating provided	30%	15%	32%
Nova Scotia	6.6	7.9	6.3
No rating provided	25%	6%	28%
New Brunswick	6.1	7.4	5.9
No rating provided	34%	9%	37%
Prince Edward Island	6.7	7.9	6.5
No rating provided	31%	11%	33%
Quebec	6.7	7.9	6.5
No rating provided	19%	6%	21%
Ontario	6.9	7.7	6.8
No rating provided	21%	5%	23%
Manitoba	5.6	6.8	5.4
No rating provided	34%	7%	38%
Saskatchewan	5.7	6.7	5.5
No rating provided	32%	6%	36%
British Columbia	7.4	8.8	7.2
No rating provided	26%	5%	29%
Yukon	6.2	7.3	6.1
No rating provided	27%	14%	29%
Northwest Territories	6.1	6.9	5.9
No rating provided	31%	23%	32%
New York State	6.9	7.2	6.9
No rating provided	8%	3%	8%
Colorado	7.5	8.3	7.4
No rating provided	8%	*	9%
Florida	7.1	7.4	7.0
No rating provided	4%	2%	5%
California	7.5	7.6	7.5
No rating provided	5%	*	6%
Hawaii	8.4	8.8	8.3
No rating provided	5%	3%	5%
Arizona	7.0	7.8	6.9
No rating provided	6%	*	7%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 28. ***Bold rows** are average ratings 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. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade.¹ Caution: small base size.

4. 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 Archaeology & Palaeontology Tourists' list for having *many good reasons* to visit on a pleasure trip (see Table 13).¹⁵ Specifically, Hawaii tops the list with 7-in-10 stating that there are many good reasons to go to this tropical destination.

Alberta is well down in the sequence, with only one-fifth of Archaeology & Palaeontology Tourists (22%) claiming that there are *many good reasons* to go to this province. Hawaii, California, Florida and Colorado far surpass Alberta as a destination with many reasons to visit according to Archaeology & Palaeontology Tourists. The ranking of destinations with *many good reasons to visit* is essentially the same for members of this niche sector as it is for the U.S. pleasure market as a whole (see summary below).

Summary: Destinations With Many Good Reasons to Visit¹⁶

<u>Archaeology & Palaeontology Tourists</u>		<u>All U.S. Pleasure Tourists</u>	
Hawaii	72%	Hawaii	67%
California	59%	Florida	54%
Colorado	56%	California	53%
Florida	51%		
Alberta	22%	Alberta	10%

As with the *appeal* rating discussed in the previous chapter, Alberta has a much more favourable image among those who have experienced what it can offer – those who have travelled in the province over the past decade. Three-quarters of these U.S. Travellers to Alberta claim that there are *many good reasons* to visit the province (72%).

¹⁵ 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*.

¹⁶ See Table 13 for the full array of ratings.

TABLE 13: NUMBER OF REASONS TO VISIT
VARIOUS DESTINATIONS

	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
<i>% stating "MANY" good reasons to visit</i>			
Alberta	22%	72%	15%
<i>Rank order among Archaeology & Palaeontology Tourists</i>			
Hawaii	72%	82%	71%
California	59%	64%	58%
Colorado	56%	77%	52%
Florida	51%	52%	51%
New York State	47%	41%	47%
Arizona	39%	52%	37%
British Columbia	38%	72%	33%
Ontario	34%	50%	32%
Quebec	30%	47%	28%
Nova Scotia	27%	62%	22%
Prince Edward Island	27%	59%	23%
Yukon	23%	41%	21%
Northwest Territories	20%	29%	19%
Newfoundland & Labrador	19%	32%	17%
New Brunswick	19%	44%	16%
Saskatchewan	13%	22%	12%
Manitoba	11%	20%	10%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 29. Proportions are those stating MANY good reasons to visit. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade.¹ Caution: small base size.

V. Activities On Overnight Trips

A. 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, American Archaeology & Palaeontology Tourists claim to have taken an overnight trip motivated by a dig or site in the past two years and to have taken overnight pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Nonetheless, it is reasonable to assume that some of the archaeological or palaeontological activities that have motivated trips among those who have been to Alberta over the past decade were within the province.

“Main Reason” and “Any Participation”

Tourists who indicate that a particular activity is the *main reason for taking a trip* are, in effect, expressing a much more significant commitment to the activity than are those who say they engaged in a particular activity on at least one of the overnight trips they took recently. In the following section, information is presented for selected individual or groups of related activities that *drive* Archaeology & Palaeontology 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.

B. Trip Activities & Drivers

1. Major Trip Activity Groups

Like most tourists, Archaeology & Palaeontology 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 to engage in archaeological or palaeontological activities, almost all tourists in this niche sector take trips primarily to see **historic sites and buildings**.
- Close to three-quarters take trips primarily to engage in at least one **land-based outdoor activity** such as camping, hiking, bird watching or viewing land-based animals.
- Over half are motivated to take trips by at least one **water-based outdoor activity** such as fishing or paddling, to stay in a resort, campground or lodge (**lodging**) or go to **museums**;
- Similarly, about half of Archaeology & Palaeontology Tourists take trips primarily to enjoy **dining and wine-related** experiences, engage in **entertainment** activities such as theme parks, casinos and movies; or go to **fairs and festivals**.
- About one-third of Archaeology & Palaeontology Tourists say they have taken holidays with a primary motivation of **shopping**, going to **art galleries** and/or **spectator sporting events** such as professional baseball or football games.
- **Aboriginal cultural events** and/or **other cultural performances** attract about one-fifth of Archaeology & Palaeontology Tourists as trip motivators.

In many respects, U.S. Travellers in Alberta resemble *all* Archaeology & Palaeontology Tourists when it comes to the groups of activities that drive their recent overnight pleasure trips. There are, however, some significant differences between those who have travelled in Alberta over the past decade and sector members as a whole:

- **land-based outdoor activities** such as hiking, bird watching or viewing animals along with **lodging-based activities** (resorts, lodges) as trip drivers are more

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

widespread among U.S. Travellers to Alberta than they are for members of the sector as a whole;

- going to **Aboriginal cultural attractions** or events is significantly more likely to motivate American tourists who have been to Alberta than they are to drive trips among Archaeology & Palaeontology Tourists as a whole.

Not surprisingly, *participation* rates for many activities are appreciably higher than are *motivation* rates. Increases in *any participation* over *motivation* are evident for virtually every major activity group among Archaeology & Palaeontology Tourists as a whole and those who have been to Alberta over the past decade.

For example, more Archaeology & Palaeontology 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 (70%). The most dramatic shift, however, is associated with shopping. Almost 9-in-10 Archaeology & Palaeontology Tourists say that they went shopping on a recent trip but only 1-in-3 of them took the trip primarily *in order to shop*.

Compared to *all* U.S. overnight pleasure travellers, Archaeology & Palaeontology Tourists and especially those who have been to Alberta over the past ten years are much more likely to identify activities in most major activity groups as ones that *motivated* recent trips (main reason). Some examples are displayed in the following table.¹⁹

<u>Major Activity Group</u>	<u>Main Reason</u>		<u>Any Participation</u>	
	Archaeology & Palaeontology Tourists	All U.S. Pleasure Tourists	Archaeology & Palaeontology Tourists	All U.S. Pleasure Tourists
Outdoor Land-Based	70%	30%	86%	63%
Theme/Amusement Parks	46%	22%	61%	43%
Food/Wine	50%	13%	92%	74%
Art Galleries	30%	3%	50%	15%

These findings suggest that to attract U.S. Archaeology & Palaeontology Tourists to Alberta, tourism marketers, especially those assembling tour packages, might take into account the following:

- Archaeology & Palaeontology Tourists and especially those who have demonstrated a willingness to travel to Alberta are *multi-dimensional* tourists.

¹⁹ For more information on U.S. pleasure tourists in total, see Detailed Tabulations, under separate cover.

- They may place particular emphasis on *archaeological sites and digs* for some of their trips, but many also take trips in order to see other historic sites; have low-energy encounters with the outdoors, possibly at a lodge or resort; go to theme parks or casinos; enjoy local and internationally acclaimed cuisine or wine tasting; or attend spectator sporting events. Packaging and marketing archaeological and palaeontological experiences and activities along with these *other* interests may be particularly successful.
- The contrast between the relatively high levels of participation in dining, shopping and cultural performances as *one of many* trip activities and the appreciably lower levels of trips motivated by these activities suggests that Archaeology & Palaeontology Tourists may require assurances that they will have opportunities to shop, have fine dining experiences and attend music, dance or theatre performances while on an archaeology or palaeontology focussed trip.
- It will likely be upscale and older Archaeology & Palaeontology Tourists who are most apt to consider a trip to Alberta because they have the time and financial resources for long-haul travel. As a consequence, marketing efforts should focus on activities and services appropriate to an older market.
- Combining Alberta's exceptional *land* and *water* oriented outdoor products and/or *Aboriginal experiences* with archaeological and palaeontological experiences and *other history-oriented activities* might have special appeal to niche groups within the sector.

TABLE 14: MAJOR ACTIVITY GROUPS
- MAIN & ANY

	Archaeology & Palaeontology Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(650)	(650)	(78) ¹	(78) ¹
Weighted, Projected	2,506,000	2,506,000	315,000	315,000
Historic Sites/Buildings	92%	96%	85%	97%
Outdoor Land Based Activities	70%	86%	84%	88%
Outdoor Water Based Activities	54%	72%	51%	72%
Lodging (Lodges, Resorts, etc.)	52%	78%	64%	86%
Museums	51%	72%	58%	80%
Food & Wine	50%	92%	52%	95%
Fairs & Festivals	48%	68%	44%	73%
Theme/Amusement Parks/Movies (Entertainment)	46%	61%	38%	61%
Shopping	33%	86%	31%	93%
Spectator Sports	30%	42%	29%	38%
Art Galleries	30%	50%	30%	53%
Performing Arts	26%	46%	30%	53%
Aboriginal Culture/Events	26%	41%	39%	57%
Outdoor Winter Activities	20%	25%	22%	26%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 4 - 13. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. ¹Caution: small base size.

2. Individual Trip Activities: The Outdoors

When taken as a whole, the *outdoor* activity profile of **Archaeology & Palaeontology Tourists** suggests individuals who *observe* rather than *interact* with nature (see Table 15).²⁰ Outdoor activities that attract at least 1-in-3 of these tourists on an *any participation* basis include going to well-known natural wonders, nature parks, viewing flora or fauna, camping, sunbathing or sitting on a beach, swimming in oceans or taking day hikes. Slightly fewer include fishing, snorkelling, boating and swimming in fresh water among their trip activities. Of these activities, seeing well-known natural wonders and going to nature parks are most apt to be trip drivers (*main activity*).

By and large, U.S. travellers who have visited Alberta in the past decade are likely to participate in the *same* types of outdoor activities as are sector members as a whole. These activities include those that are widely available within the province - going to parks such as Banff, Jasper or Waterton Lakes National Park, seeing well-known natural wonders such as the Canadian Badlands, viewing wildlife, camping and/or taking day hikes.

²⁰ 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*

	Archaeology & Palaeontology Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(650)	(650)	(78) ¹	(78) ¹
Weighted, Projected	2,506,000	2,506,000	315,000	315,000
Well-known natural wonders	52%	65%	58%	77%
Nature park	41%	54%	51%	62%
Flora/fauna viewing	31%	51%	41%	66%
Wildlife viewing – land based animals	22%	38%	27%	53%
Whale watching	16%	28%	33%	45%
Wildflowers/flora	16%	32%	23%	43%
Bird watching	15%	26%	15%	39%
Camping	27%	44%	40%	59%
Public campground	22%	35%	37%	48%
Private campground	13%	24%	18%	33%
Wilderness camp site	13%	18%	17%	30%
Sunbathing or sitting on a beach	24%	42%	20%	44%
Swimming in oceans	23%	43%	19%	45%
Hiking – Day excursions	23%	44%	20%	50%
Fishing	16%	26%	7%	29%
Fresh water	13%	21%	5%	21%
Diving/snorkelling	16%	26%	19%	27%
Snorkelling in sea/ocean	12%	21%	15%	24%
Boating (motorboat/sailboat)	14%	25%	9%	26%
Swimming in lakes	11%	25%	4%	22%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 4 - 13. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 at least 1-in-4 Archaeology & Palaeontology Tourists as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover. ¹Caution: small base size.

3. Individual Trip Activities: Culture and Entertainment

By definition, Archaeology & Palaeontology Tourists take some of their trips *in order to* participate in a dig or tour archaeological and palaeontological sites. They are also motivated to take trips in order to engage in a variety of other cultural and entertainment activities (see Table 16).

For example, approximately 9-in-10 sector members took recent holidays primarily in order to go to historic sites or buildings. Close to half took a trip primarily to stroll around a city to see architecture (45%) and more than one-third did so in order to go to a general history museum or an amusement park. Approximately 3-in-10 were motivated to travel primarily to attend a spectator sporting event, visit an aquarium, an art gallery, or a science and technology museum. For about 1-in-4 Archaeology & Palaeontology Tourists, recent trips were primarily driven by interests in Aboriginal culture, zoos, gambling (casino), performing arts such as live theatre or music concerts, and/or military museums.

Any Participation

With the exception of archaeological and palaeontological activities and those associated with historic sites, most other cultural and entertainment activities are noticeably more likely to be *one-of-many* trip activities than they are to be trip drivers for Archaeology & Palaeontology Tourists.²¹ For example, 1-in-4 say they took at least one recent pleasure trip primarily to see Aboriginal cultural sites and events (26%, main), but 2-in-5 went to an Aboriginal site or pow wow as one of their trip activities (41%, any). Analogously, 1-in-5 have taken a trip to attend a *fireworks display* (22%, main) but 1-in-3 have gone to this type of event on a recent holiday (34%, any). Similarly, 1-in-4 sector members took trips in order to go to a *casino* (24%, main) while 1-in-2 went to this type of establishment as one of their activities on a recent trip (50%, any).

The vast array of cultural and entertainment activities engaged in by Archaeology & Palaeontology Tourists attests to their eclectic and wide-ranging interests. They describe themselves as tourists who want to return home from their trips having *seen and done something new and different* and to have obtained *knowledge of history, culture and places*.²² Thus, when marketing Alberta to them, consideration might be given to a *menu* that highlights Alberta's other historic, cultural and entertainment attractions.

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

²² See Section VII.B: *Benefits Sought From Pleasure Travel* for details.

- Such a menu might include well-known historic sites, architectural walking tours of cities, general history and science and technology museums, art galleries and Aboriginal cultural sites or events.
- On the lighter side and to provide evening entertainment, spectator sporting events, casinos, fireworks displays, and theatre or music performances might also be included on the menu. The menu concept might convey to potential Archaeology & Palaeontology Tourists that Alberta offers *many things for adults to see and do* – a highly important factor in destination selection for these tourists.²³

²³ See Section III.D.2: *Importance of Conditions in Destination Choice* for details.

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

	Archaeology & Palaeontology Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(650)	(650)	(78) ¹	(78) ¹
Weighted, Projected	2,506,000	2,506,000	315,000	315,000
Archaeology & Palaeontology Activities				
Palaeontological/archaeological sites	88%	91%	85%	93%
Archaeological digs	23%	28%	24%	27%
Cultural Festivals/Events (any)	19%	26%	19%	31%
Music festivals	14%	21%	12%	24%
Exhibitions or fairs	20%	31%	20%	32%
Firework displays	22%	34%	16%	31%
Farmers' markets or country fairs	21%	42%	17%	49%
Other Cultural Activities				
Historic sites/buildings (any)	92%	96%	85%	97%
Historic replicas with re-enactments	29%	38%	20%	39%
Historic sites - well-known	51%	73%	50%	85%
Historic sites – other	47%	69%	49%	81%
Strolling around a city to see architecture	45%	67%	49%	77%
General history museum	38%	58%	41%	66%
Art galleries	30%	50%	32%	53%
Science and technology museum	29%	42%	32%	51%
Military museums	26%	36%	22%	33%
Performing Arts (any)	26%	46%	30%	53%
Music performances	19%	33%	20%	38%
Live theatre	17%	31%	23%	36%
Aboriginal Culture/Events (any)	26%	41%	39%	57%
Aboriginal heritage attractions	18%	32%	34%	51%
Aboriginal arts and crafts shows	11%	24%	14%	39%
Entertainment				
Amusement parks	35%	45%	30%	45%
Aquariums	30%	45%	19%	36%
Zoos	27%	42%	20%	48%
Casinos	24%	50%	23%	45%
Botanical gardens	22%	37%	25%	47%
Movies/cinema	18%	44%	23%	50%
Rock & roll/popular music concert	17%	25%	10%	22%
Water theme parks	16%	25%	15%	26%
Free outdoor performances	16%	35%	11%	29%
Spectator sporting events	30%	42%	29%	38%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 4 - 13. *Total* includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. *U.S. Travellers to Alberta* are Archaeology & Palaeontology 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 at least 1-in-4 Archaeology & Palaeontology Tourists as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover. ¹Caution: small base size.

4. Individual Trip Activities: Lodging, Food/Wine, Shopping

Lodging

Resorts, and most particularly seaside and lakeside resorts, drive trips for about two-fifths of Archaeology & Palaeontology Tourists (main) and are used for lodging by over three-fifths of these travellers (any) (see Table 17). Seaside resort experiences (22% *main*; 39% *any*) and lakeside resorts (19% *main*; 31% *any*) are somewhat more widely sought than are ski or mountain resorts (16% *main*; 24% *any*) or wilderness lodges (13% *main*; 21% *any*).

Among U.S. Travellers to Alberta, however, there are directional indications to suggest that the resort experiences Alberta offers – ski, mountain and wilderness resorts or lodges – are more popular than is the case for Archaeology & Palaeontology Tourists as a whole.

Food & Wine

Collectively, food and wine activities drive trips for half of Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists.

Shopping

Shopping for apparel, local arts and crafts and books or music is a common trip pastime for Archaeology & Palaeontology Tourists, but tends not to be the motivation for recent overnight pleasure travel.

* * * * *

Shopping and dining experiences are clearly in high demand among Archaeology & Palaeontology Tourists as one of the many activities they engage in at a destination. Thus, 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.

A niche group within the Archaeology & Palaeontology Tourist market may also respond to a wilderness lodge or ski or mountain resort experience combined with one or more archaeology or history-oriented activity.

TABLE 17: OTHER ACTIVITIES – MAIN & ANY*	Archaeology & Palaeontology Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(650)	(650)	(78) ¹	(78) ¹
Weighted, Projected	2,506,000	2,506,000	315,000	315,000
<i>In rank order by main reason within each subgroup</i>				
Lodging (NET)**	52%	78%	64%	86%
Resorts/Spas	39%	59%	40%	66%
Seaside resort	22%	39%	27%	42%
Lakeside resort	19%	31%	25%	49%
Ski/mountain resort	16%	24%	17%	35%
Wilderness/remote lodge	13%	21%	19%	29%
Food & Wine	50%	92%	52%	95%
Dining – restaurants offering local ingredients and recipes	29%	78%	27%	82%
Wineries – day tours/tastings	21%	40%	28%	44%
Local outdoor cafes	18%	57%	22%	54%
Food/drink festivals	18%	28%	12%	19%
Dining – high end restaurants with international reputation	14%	38%	17%	43%
Dining – other high end restaurants	14%	43%	14%	44%
Shopping	32%	86%	31%	93%
Clothing, shoes, jewellery	22%	63%	20%	66%
Local arts & crafts studios	20%	62%	20%	76%
Bookstores or music stores	19%	56%	16%	53%
Antiques	17%	46%	15%	40%
Greenhouse/garden centres	14%	29%	16%	36%
Gourmet foods	12%	35%	15%	43%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 4 - 13. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 at least 1-in-4 Archaeology & Palaeontology Tourists as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover. ¹Caution: small base size. **See Outdoor Activities for camping.

5. Overnight Cruises & Organized Group Tours

Approximately one-third of Archaeology & Palaeontology Tourists and over half of those with travel experience in Alberta over the past decade have recently been overnight cruise passengers (see Table 18). Caribbean cruises are the most popular among these tourists, far surpassing Alaska as a cruise destination among Archaeology & Palaeontology Tourists as a whole. Among those who have been to Alberta in the past ten years, however, Alaska and the Caribbean are almost equally popular cruise destinations.

Archaeology & Palaeontology Tourists are likely to have participated in *any* overnight group tour (51%) over the past two years. Of these participants, about equal proportions claim to have taken an **organized** overnight group tour (34%) and a **self-directed** touring trip over a two-year period (30%). Those who have gone on an overnight organized tour do not display a strong preference for tours to *single* (20%) versus *multiple* destinations (29%).

Taking a day tour while on an overnight trip is as characteristic of Archaeology & Palaeontology Tourists (55%) as is taking any type of overnight tour (51%). Favoured themes for organized day excursions include tours around a city or the countryside, followed by wilderness or outdoor tours and sightseeing cruises. These same themes are popular among Archaeology & Palaeontology Tourists who take *self-directed* day touring excursions.²⁴

²⁴ See Detailed Tabulations, Volume 1, page 16-2 for figures.

TABLE 18: CRUISES/GROUP TOURS	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Took any overnight cruise in past 2 years	36%	55%	33%
Type of Cruise/Destination			
Ocean - Caribbean	16%	26%	14%
Ocean - Other	13%	22%	12%
Ocean - Alaska	8%	22%	6%
Great Lakes	3%	7%	2%
Overnight Touring (NET)	51%	71%	48%
Organized Tour	34%	59%	30%
Multiple Location	29%	57%	25%
Single Location	20%	30%	18%
Self-Directed Touring	30%	32%	29%
Same-Day Touring on Overnight Trip (NET)	55%	60%	54%
Self-Directed Touring	40%	43%	39%
Organized Excursion	40%	50%	38%
Type of Organized Day Tour			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%) ²	(100%)
City	72%	81%	70%
Countryside	62%	78%	59%
Wilderness/outdoor	44%	51%	42%
Sightseeing cruise (day excursion)	39%	61%	34%
Wineries	27%	30%	26%
Factory	19%	36%	15%
Casino	18%	25%	17%
Airplane/helicopter (pilot or passenger)	11%	29%	8%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 14 - 16. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade.¹Caution: small base size. ²Caution: extremely small base size.

VI. Trip Planning

A. Who Does the Planning?

Almost all Archaeology & Palaeontology 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 archaeology or palaeontology enthusiast or is shared with other household members.

TABLE 19: TRAVEL PLANNING	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Frequency of personal involvement in trip planning, past 2 years			
All	71%	64%	72%
Most	14%	11%	14%
Some	10%	19%	9%
None/not stated	5%	6%	5%
Main responsibility for trip planning			
Respondent	42%	30%	44%
Shared with other household member	26%	25%	26%
Spouse/partner	17%	29%	16%
Other/not stated/not involved in travel planning	15%	15%	15%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 18/19. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade.¹ Caution: small base size.

B. Travel Information Sources & Travel Media

Archaeology & Palaeontology Tourists use many sources to obtain travel information sources. The **internet** tops the chart for these tourists (81%) (see Table 20). Over half rely on their own **past experience**, anecdotal information provided by **friends and relatives** and/or **maps**. Two-fifths of sector members include **newspaper articles** (42%) or **official travel guides or brochures from provincial, state or national organizations** (41%, *Official Travel Guides*) among their sources of travel information.

Other travel information sources used by at least one-third of Archaeology & Palaeontology Tourists include **visitor information centres, auto clubs and travel agents**.

Possibly because Archaeology & Palaeontology Tourists are more apt to travel to many distant and, often, exotic destinations, they rely on more information sources than does the U.S. travelling public as a whole (see following table).

Travel Information Sources Used By At Least 1-in-3

Archaeology & Palaeontology Tourists		U.S. Pleasure Tourists in Total	
Internet website	81%	Internet website	68%
Past experience	56%	Past experience	49%
Friends/relatives	53%	Friends/relatives	41%
Maps	51%		
Newspaper articles	42%		
Official travel guides	41%		
Visitor information centres	38%		
Auto club	35%		
Travel agent	35%		

With most Archaeology & Palaeontology Tourists relying on the internet for travel planning and over one-half saying that they *normally* visit **travel websites**, the internet offers the greatest potential for reaching this market. Over half say they normally watch travel shows on televisions and about one-third seem to be regular readers of their weekend (35%) or weekday (32%) newspaper's travel section. Similar proportions are also regular readers of home/garden magazines, news magazines such as *Time* or *Newsweek*, entertainment magazines such as *People* and food or cooking magazines like *Gourmet* or *Bon Appetit*. Slightly fewer claim regular readership of travel periodicals such as *Travel & Leisure*.²⁵

²⁵ 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	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
<u>SOURCES OF TRAVEL PLANNING INFO</u>			
Internet website	81%	82%	81%
Past experience	56%	65%	55%
Advice of friends/relatives	53%	56%	53%
Maps	51%	58%	50%
Official travel guides	41%	58%	39%
Visitor information centres	38%	36%	38%
Any newspaper	44%	52%	43%
Articles	42%	52%	41%
Advertisements	21%	30%	20%
Auto club	35%	41%	34%
Travel agent	35%	59%	31%
Travel information in mail	32%	54%	28%
Travel guide books	31%	37%	31%
Any television	21%	24%	21%
Programs	19%	21%	19%
Advertisements	8%	6%	9%
Electronic newsletters via e-mail	15%	23%	13%
Trade, travel, sportsmen's shows	7%	11%	6%
<u>TRAVEL MEDIA</u>			
Frequently read newspaper Travel Section			
In weekday editions	32%	49%	29%
In weekend editions	35%	37%	35%
Magazines read in typical month			
Home/garden	36%	33%	36%
News (<i>Time, Newsweek</i>)	36%	51%	34%
Entertainment/music (<i>People, TVGuide</i>)	34%	24%	36%
Food/cooking (<i>Gourmet, Bon Appetit</i>)	33%	29%	34%
Travel (<i>Condé Nast, Travel & Leisure</i>)	29%	39%	28%
General interest (<i>Harper's, New Yorker</i>)	29%	40%	28%
Business (<i>Business Week, Forbes</i>)	27%	29%	27%
Health, fitness and well living	26%	27%	26%
Auto/cycle (<i>Car & Driver, Motor Trend</i>)	25%	27%	25%
Crafts/antiques	23%	23%	23%
Normally watch Travel Shows on TV	53%	64%	52%
Normally visit Travel websites	55%	68%	53%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 20, 30 - 32. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology 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 - 33). ¹Caution: small base size.

C. Internet Use for Travel Inquiries & Bookings

As noted in the previous section, most Archaeology & Palaeontology Tourists rely on the internet for travel planning. Travel sites such as *Expedia* or *Travelocity*, followed by hotel/resort, airline and Destination Marketing Organization (DMO) sites are the most commonly used websites among those who rely on the internet for travel planning (see Table 21). Attraction sites are used by almost half of these tourists.

Not surprisingly, *booking* online is less common than is searching for information on the internet. Nonetheless, three-fifths of American Archaeology & Palaeontology Tourists (59%) claim to have made a travel-related booking online over the past two years or so. As their website preferences would suggest, the most common online bookings are for accommodation followed by air tickets and, to a lesser degree, car rentals, attractions and package deals.

Cutting through the clutter to get the attention of Archaeology & Palaeontology Tourists for Alberta's digs and sites is especially important because members of this sector are both widely travelled and have an expansive set of interests. Options to boost awareness might include the following:

- Reach those who are older and commonly retired from the labour force through websites and membership publications dedicated to retirement or senior's affinity groups (e.g., Association for the Advancement of Retired Persons – AARP).
- Maintain visibility on electronic sites such as *Expedia* or *Travelocity* and use Alberta's DMO websites such as *TravelAlberta.com* to focus on topics of interest to Archaeology & Palaeontology Tourists.
- In the media mix, include daily or weekend travel sections of local newspapers with editorial coverage of Alberta's archaeological and palaeontological sites; home and garden magazines and the official printed guides from the province or its municipalities and regions because these materials enjoy relatively widespread audiences among Archaeology & Palaeontology Tourists.
- Create goodwill ambassadors from Archaeology & Palaeontology Tourists who come to Alberta to ensure that *advice of friends/relatives* is favourable and forthcoming. To meet this objective, Alberta has to deliver on its promises to Archaeology & Palaeontology Tourists. Based on the high overall rating by those who have been to Alberta over the past decade (8.5 on a ten point scale), the province seems to be achieving this goal.

TABLE 21: WEBSITE USAGE FOR TRAVEL PLANNING	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Used Internet website for travel planning, past 2 years	81% (100%)	82% (100%)	81% (100%)
<u>Internet website(s) used</u> <i>(Among Users)</i>			
Travel planning/booking	64%	59%	65%
Hotel/resort	59%	68%	58%
Airline	58%	72%	56%
Destination marketing organization	54%	59%	53%
Attraction	45%	46%	45%
Cruise	26%	39%	24%
Motorcoach	5%	11%	4%
Other	37%	49%	35%
Any Internet Purchases in Past 2 Years <i>(Among All Overnight Pleasure Travellers)</i>	59%	56%	60%
<u>Items Purchased Online</u> <i>(Among Purchasers)</i>	(100%)	(100%)²	(100%)
Accommodation	83%	76%	84%
Air tickets	78%	86%	77%
Car rental	48%	63%	46%
Tickets for activities/attractions	38%	37%	38%
Package deal (2+ items)	26%	37%	25%
Rail, bus, boat tickets	25%	33%	24%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 21 and 22. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade. ¹Caution: small base size. ²Caution: extremely small base size.

VII. Other Travel-Related Information

A. Use of Package Deals

Purchase of package deals in the past two years is relatively common among Archaeology & Palaeontology Tourists (see Table 22). Few say they relied on a package deal for *all* or *most* of their trips over the past two years (8%), but 1-in-3 claim to have used package deals for *one* or *some* of these trips (34%). The incidence of buying packaged tours for at least one trip over the past two years is directionally higher among U.S. Travellers to Alberta (60%) than is the case within the broader market (42%).

Those who purchase packages want them to include accommodation, transportation to the destination, followed by transportation at the destination and tickets for activities and attractions. Somewhat fewer would like the package to include food and beverages.

TABLE 22: PACKAGE DEALS	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	8%	11%	7%
One/some trips	34%	49%	32%
No trips/not stated/not sure	58%	40%	61%
Desired Components of Packages (Among Purchasers of Packages)			
	(100%)	(100%) ²	(100%)
Accommodation	93%	100%	91%
Transport to destination	89%	99%	87%
Transport at destination	78%	88%	76%
Tickets for activities/attractions	68%	70%	67%
Food and beverage	56%	62%	55%
Other	32%	43%	29%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 23. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade. ¹Caution: small base size. ²Caution: extremely small base size.

B. Benefits Sought From Pleasure Travel

At the top of the list of benefits for taking pleasure or vacation trips among Archaeology & Palaeontology Tourists are **seeing and doing new and different things**, followed by a **break from the day-to-day environment** and the trip's ability to **relieve stress** (see Table 23).²⁶ Two-thirds of these travellers attach a high level of importance to these attributes.

Approximately three-fifths want their vacations to be the basis of lasting **memories** or add to their **knowledge of history, cultures and places** while about half hope their trip will help **enrich familial relationships, enrich perspectives**, provide an **intellectual challenge** and/or allow them to **abandon a fixed schedule**.

The benefits sought by Archaeology & Palaeontology Tourists differ quite substantively from U.S. pleasure travellers as a whole, suggesting that the niche market is more *knowledge* driven than is the general public.

Top Highly Important Benefits

Archaeology & Palaeontology Tourists		U.S. Pleasure Tourists in Total	
See/do something new/different	69%	Break from day-to-day	72%
Break from day-to-day	67%	Relax/relieve stress	72%
Relax/relieve stress	66%	Create lasting memories	58%
Create lasting memories	63%	Enrich relationship - partner/children	55%
Knowledge of history, cultures, places	57%	No fixed schedule	53%
Enrich relationship - partner/children	54%		
Enrich perspectives	49%		
Stimulate mind/intellectual challenge	46%		
No fixed schedule	45%		

Benefits with *low appeal* to Archaeology & Palaeontology Tourists include **being pampered, having stories to tell** once the trip is over, finding **solitude and isolation** and **renewing personal connections (non-family)**.

* * * * *

From a marketing perspective, Archaeology & Palaeontology Tourists might be reminded that Alberta offers *memorable* sites that can be experienced in a relaxed and stress-free way. They might also be informed that they will take away new knowledge and insights from their travels in the province. These tourists want their trip to include

²⁶ Consumers 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*.

experiences they would not find elsewhere. The “special” qualities of the trip can be a combination of unique elements of Alberta’s archaeological and palaeontological sites and interpretive centres, other historical and cultural activities of interest to these tourists, and the province’s outdoor splendour.

TABLE 23: BENEFITS SOUGHT FROM PLEASURE TRAVEL (<i>Highly important</i>)	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
<i>% Stating “Highly Important” (rank order)</i>			
See/do something new/different	69%	78%	67%
Break from day-to-day environment	67%	55%	68%
Relax/relieve stress	66%	53%	67%
Create lasting memories	63%	74%	61%
Knowledge of history, cultures, places	57%	68%	56%
Enrich relationship with partner/children	54%	58%	54%
Enrich perspectives	49%	59%	47%
Stimulate mind/intellectual challenge	46%	58%	45%
No fixed schedule	45%	41%	46%
Keep family ties alive	40%	29%	42%
Physical challenge	22%	21%	23%
To be pampered	19%	19%	19%
Stories to share	18%	15%	19%
Solitude and isolation	17%	10%	18%
Renew personal connections (non-family)	15%	12%	16%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 25. “Total” includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. “U.S. Travellers to Alberta” are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade. ¹Caution: small base size.

C. Incidence of Summer/Winter Trips

Almost all Archaeology & Palaeontology Tourists say that they have taken an overnight pleasure trip during the summer months and 7-in-10 have taken winter trips (see Table 24). Winter travel is slightly more characteristic of the U.S. Travellers to Alberta segment of the market. Winter trips among U.S. Travellers to Alberta might include those taken for winter outdoor activities such as alpine skiing, but also could include cruises to the Caribbean or beach holidays in Florida.

TABLE 24: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Took Overnight Pleasure Trip in Past 2 Years In . . .			
Summer	86%	85%	86%
Winter	72%	86%	70%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 24. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade.¹ Caution: small base size.

D. Memberships in Various Organizations

Frequent flyer program and auto club memberships are characteristic of 1-in-2 Archaeology & Palaeontology Tourists (see Table 25). Appreciably fewer of these tourists belong to a hotel or car rental loyalty program (31%) and fewer still are members of sports, community service or reading clubs.

There are directional indications to suggest that U.S. Travellers to Alberta are more apt to hold memberships in auto clubs, frequent flyer programs, sports clubs and travel clubs than are Archaeology & Palaeontology Tourists in total.

TABLE 25: MEMBERSHIPS	Archaeology & Palaeontology Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(650)	(78) ¹	(572)
Weighted, Projected	2,506,000	315,000	2,192,000
Auto club	50%	61%	48%
Frequent flyer program	51%	72%	48%
Hotel/car rental loyalty program	31%	37%	30%
Sports club	22%	32%	21%
Community service club	20%	29%	19%
Book/reading club	16%	19%	15%
Hobby club	11%	11%	11%
Nature/environmental club	18%	20%	17%
Travel club	13%	22%	12%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 35. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to palaeontological/ archaeological sites and/or archaeological digs. "U.S. Travellers to Alberta" are Archaeology & Palaeontology 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 Archaeology & Palaeontology Tourists with no trips to Alberta reported over the past decade. ¹Caution: small base size.

VIII. Archaeology & Palaeontology Tourists in 2015 and 2025

Based on information provided by the U.S. Census Bureau, the size of the Archaeology & Palaeontology sector has been projected to two points in the future: 2015 and 2025 (see Table 26).

Growth in the U.S. Adult Population

Between 2006 when the TAMS study was conducted and 2015, it is estimated that the U.S. adult population will grow by about ten percent, from 222.8 million adults to 244.3 million adults. A longer-term projection, from 2006 to 2025, generates an estimate of nineteen percent growth, from the current 222.8 million to approximately 265.2 million U.S. adults. These growth rates are, in effect, the benchmarks against which growth in the Archaeology & Palaeontology Tourist sector can be assessed.

Growth in the U.S. Archaeology & Palaeontology Tourism Sector

The Archaeology & Palaeontology Tourism market is expected to increase at a short-term rate that is essentially the same as that of the U.S. adult population as a whole. Specifically, the market will increase by eleven percent between 2006 and 2015, from 2.5 million to 2.8 million. A somewhat higher long-term growth rate is anticipated for Archaeology & Palaeontology Tourists. Compared to a population growth rate of nineteen percent, the Archaeology & Palaeontology market is expected to increase by 24% between 2006 and 2025, from 2.5 million to 3.1 million.

Growth in the U.S. Archaeology & Palaeontology Tourism Sector – U.S. Travellers to Alberta

Projections for sector members who have visited Alberta over the past decade should be interpreted with extreme caution because of the small base size of these travellers. Bearing this caveat in mind, there would appear to be greater growth potential for these Archaeology & Palaeontology Tourists in the longer rather than the shorter term. Compared to the corresponding group within the U.S. general public (i.e., *all* Americans who have taken trips to Alberta over the previous decade), Archaeology & Palaeontology Tourists with past experience in Alberta are expected to increase by 23% between 2006 and 2015, from 315,000 to 388,000. At 37%, longer-term growth will be noticeably higher than the rate expected for *all* U.S. tourists to Alberta (27%), bringing the sector to 433,000 by 2025.

Recall, however, that U.S. Travellers to Alberta include Americans coming for business, to see friends and relatives and other purposes as well as for pleasure. In fact, based on 2006 estimates, approximately one-third of Archaeology & Palaeontology Tourists who are U.S. Travellers to Alberta claim to have taken a **pleasure trip** to the province over a two-year period (36%). If this pattern holds, the “high propensity” market for archaeology and palaeontology tourism experiences in

Alberta – those who have already experienced some of the tourism goods and services Alberta offers – would be about 140,000 in 2015 and about 156,000 by 2025.

TABLE 26: PROJECTIONS TO 2015, 2025

	Total		U.S. Travellers to Alberta	
	Number of Adults	Rate of Change over Current	Number of Adults	Rate of Change over Current
US Adult Population (18+)				
Current	222,846,000		5,405,000	
2015	244,292,000	10%	5,939,000	10%
2025	265,235,000	19%	6,887,000	27%
Archaeology/Palaeontology Tourists				
Current	2,506,000		315,000 ¹	
2015	2,771,000	11%	388,000 ¹	23%
2025	3,096,000	24%	433,000 ¹	37%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 51. Projections were provided by TNS Canadian Facts, based on U.S. Census Bureau data. ¹Caution: small base size.

IX. Appendices

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

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

Alberta Tourism, Parks, Recreation and Culture ²⁷	Ontario Tourism Marketing Partnership
Atlantic Canada Tourism Partnership	Parks Canada
Canadian Tourism Commission	Quebec 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

TNS Canadian Facts conducted the U.S. portion of the study between January and June 2006. The universe under study was composed of American adults (18 years and over) who were members of TNS Canadian Facts' mail panel.

Over the course of the fieldwork, 60,649 self-completed questionnaires were returned and processed by TNS Canadian Facts. Among panel members who were asked to participate in the study, the response rate was approximately 71%. The supplier has not provided the recruitment rate for panel members. In the absence of this information, it is not possible to estimate the actual response rate for the study or to comment on the representativeness of the sample overall.

Survey data were weighted and projected to the U.S. adult population based on U.S. Census estimates of household size, age and gender at a variety of city/state and/or regional levels.

Research Resolutions used the TAMS U.S. 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.

²⁷ Formerly *Alberta Economic Development*.

B. Definition of Archaeology & Palaeontology Tourists

ATPRC'S SECTORS OF INTEREST	INDIVIDUAL ACTIVITIES
ARCHAEOLOGICAL EXPERIENCES	
	Palaeontological/archaeological sites
	Archaeological digs

C. U.S. Census Regions & States

New England

Maine
New Hampshire
Vermont
Massachusetts
Connecticut

Rhode Island

Middle Atlantic

New York State
Pennsylvania
New Jersey

South Atlantic

Maryland
Delaware
Washington, D.C.
West Virginia
Virginia

North Carolina

South Carolina

Georgia

Florida

East North Central

Wisconsin

Michigan

Illinois

Indiana

Ohio

West North Central

North Dakota

South Dakota

Minnesota

Iowa

Nebraska

Kansas

Missouri

East South Central

Kentucky

Tennessee

Mississippi

Alabama

West South Central

Oklahoma

Arkansas

Texas

Louisiana

Mountain

Montana

Idaho

Wyoming

Nevada

Utah

Colorado

New Mexico

Arizona

Pacific

Washington State

Oregon

California

Alaska

Hawaii

D. TNS Canadian Facts' "Lifestage" Definitions

1 - YOUNG SINGLES:

- 1-Member Household
- Age of Head Under 35

2 - MIDDLE SINGLES:

- 1-Member Household
- Age of Head from 35 to 65

3 - OLDER SINGLES:

- 1-Member Household
- Age of Head Over 65

4 - YOUNG COUPLE:

- Multimember Household
- Age of Head Under 45
- Married or Non-related Individual(s) of Opposite Sex 18+ Present
- No Children Present

5 - WORKING OLDER COUPLE:

- Multimember Household
- Age of Head 45 and Over
- Head of Household Employed
- No Children Present
- Married or Non-related Individual(s) of Opposite Sex 18+ Present

6 - RETIRED OLDER COUPLE

- Multimember Household
- Age of Head 45 and Over
- Head of Household NOT Employed
- No Children Present
- Married or Non-related Individual(s) of Opposite Sex 18+ Present

7 - YOUNG PARENT

- Multimember Household
- Age of Head Under 45
- Youngest Child Under 6

8 - MIDDLE PARENT:

- Multimember Household
- Age of Head Under 45
- Youngest Child 6+

9 - OLDER PARENT:

- Multimember Household
- Age of Head 45+
- Child at Home - Any Age

0 - ROOMMATES

- Head of Household Living with a Non-relative 18+ of Same Sex