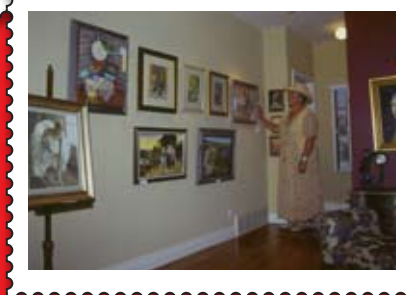


THE AMERICAN MARKET FOR CULTURAL TOURISM IN ALBERTA



TAMS

A SPECIAL ANALYSIS OF THE 2006 TRAVEL ACTIVITIES AND MOTIVATION SURVEY

The American Market for Cultural Tourism in Alberta

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

Presented to

Alberta Tourism, Parks, Recreation and Culture

Presented by

**Research Resolutions
& Consulting Ltd.**



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I. Executive Summary

MILLIONS OF AMERICANS ARE SEARCHING FOR CULTURAL TOURISM EXPERIENCES.

American Cultural Tourists – those who took overnight trips in the past two years *in order to* visit historic sites or re-enactments, museums, art galleries, archaeology/paleontology sites and/or park interpretive programs – represent approximately 25.2 million Americans, or about fifteen percent of the U.S. pleasure travel market. Of these Cultural Tourists, 1.3 million (5%) claim to have been to Alberta over the past decade (*U.S. Travellers to Alberta*).

ALBERTA ATTRACTS CULTURAL TOURISTS AT A HIGHER THAN AVERAGE RATE.

Cultural Tourists have travelled to Alberta over the past decade at a slightly 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, but as noted above, of the 25.2 million Cultural Tourists in the U.S.A., five percent or approximately 1.3 million have been to the province over the past decade.

HISTORIC SITES ARE VERY POPULAR.

Of the many individual activities that could have motivated a vacation among Cultural Tourists, *well-known historic sites/buildings* is the most popular. This activity is identified as the main reason for a trip by half of the market sector (51%). *Other historic sites* are also widely cited as the reason for a recent overnight pleasure trip (38%). *General history museums* are trip drivers for over 25% of Cultural Tourists. Approximately 20% name *historical replicas of cities or towns with re-enactments*, and/or *science/technology museums* as the main reason for a recent overnight pleasure trip.¹

CULTURAL TOURISTS LIVE IN ALL PARTS OF THE U.S.A.

Cultural Tourists live in almost every state and are distributed across the United States in a manner that is very similar to the adult population and to the American overnight pleasure travel market as a whole. Thus, about 1-in-5 reside in the South Atlantic region, led by Florida; and about one-seventh live in each of

¹ Cultural Tourist sub-sectors add to more than 100% because there is duplication in the *main reasons* volunteered for overnight trips over the past two years by sector members.

the Mid-Atlantic, East North Central and Pacific regions. By virtue of the size of their resident populations, California, Texas, and New York, followed by Florida, Pennsylvania, and Illinois are the largest single state contributors to the Cultural Tourism market.

U.S. TRAVELLERS TO ALBERTA WITHIN THE CULTURAL TOURIST SECTOR ARE CONCENTRATED IN THE WESTERN U.S.A.

Cultural Tourists who have been to Alberta over the past decade are under-represented in markets more geographically *distant* from Alberta and over-represented in regions that are physically closer to the province. Specifically, these Americans are less likely to live in the eastern U.S.A., including the Middle Atlantic and East North Central regions, but are more apt to reside in the western U.S.A. California, as the most populated of the western states, accounts for about 1-in-8 of all American adults (12% of adult population) but for 1-in-5 U.S. Travellers to Alberta within the Cultural Tourism sector (21%).

Each of the urban areas identified in this report contributes to the market for Cultural Tourists and to the subset with travel experience in the province. While no city generates more than 1-in-25 Cultural Tourists, Los Angeles, New York, Dallas and Houston top the list for the sector as a whole. San Francisco, Hartford and San Diego are also important urban markets among U.S. Travellers to Alberta.

MEN AND WOMEN OF ALL AGES SEEK CULTURAL TOURISM EXPERIENCES BUT THOSE ATTRACTED TO ALBERTA ARE OLDER.

Every age group is represented among Cultural Tourists. About 1-in-10 Americans in the sector are young adults (18 to 24 years) and almost twice this proportion is between 25 and 34 years of age or between 35 and 44 years of age. Over one-fifth are in their mid-forties to mid-fifties and over one-third are at least 55 years of age or older. Men and women are about equally likely to be Cultural Tourists.

Cultural Tourists' age profile is quite similar to *all* American adults and all overnight pleasure travellers, but differs from Cultural Tourists who have taken an overnight trip to Alberta in the past decade. Those with direct experience in the province are older. Almost three-fifths of these U.S. Travellers to Alberta are at least 55 years of age, compared to less than two-fifths of Cultural Tourists in total.

CULTURAL TOURISTS ARE UP-SCALE TRAVELLERS.

Compared to American adults and travellers in general, Cultural Tourists have higher socio-economic status: they tend to be university educated, to live in households with at least one person occupying an executive, managerial or professional position and to have annual household incomes of at least \$100,000.

Even more Americans in the culture-oriented market with experience in Alberta are university educated than is the case for the market as a whole. These U.S. Travellers to Alberta do not, however, differ substantively from all Cultural Tourists with respect to their propensity to have executive/manager occupational status or high annual household incomes, possibly because they are older and therefore, more apt to be retired.

MANY ARE INTERNATIONAL TRAVELLERS, BUT EVEN MORE LIMIT THEIR TRAVEL TO U.S. DESTINATIONS.

Not only have Cultural Tourists been to *Canada* at a higher rate (20%) than most American pleasure travellers (13%), but they have also been to *overseas countries* at a much higher rate: 34% for Cultural Tourists compared to 26% of all U.S. overnight pleasure tourists. In fact, Cultural Tourists have recently travelled to Europe at twice the rate evident for typical American pleasure tourists.

A penchant for travel to destinations *outside* the U.S.A. is especially evident among U.S. Travellers to Alberta. Although they have been to Alberta during the past decade, only about 1-in-2 of these tourists have travelled in Canada during the past two years (55%), 1-in-3 have been to Europe (34%), about 1-in-4 have been to destinations in Mexico (26%) and 1-in-5 have gone to the Caribbean (21%) in the past two years or so.

At the same time, over half of Cultural Tourists claim to travel *only* within their own country (55%). Even among Cultural Tourists who have been to Alberta within a ten-year period, almost one-quarter have confined their *recent* overnight pleasure trips to locations within the U.S.A. Thus, Alberta faces stiff competition for these tourists — from other countries and *most particularly from destinations within the U.S.A. itself.*

ONTARIO IS THE PRINCIPLE CANADIAN COMPETITOR FOR CULTURAL TOURISTS.

Over a two-year period, this central Canadian province attracted about six times as many Cultural Tourists as did Alberta. Ontario's success in this market is undoubtedly related to its relative proximity to large American population centres. Ontario's 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.

Among U.S. Travellers to Alberta, Alberta is the Canadian province most apt to have been an overnight pleasure trip destination in the past two years, although British Columbia is an equally popular destination among this subset of Cultural Tourists.

ALBERTA FACES COMPETITION FOR CULTURAL TOURISTS FROM MANY U.S. STATES.

Not only are Cultural Tourists and the U.S. Travellers to Alberta subset of this market widely travelled *internationally*, but they also are widely travelled *within* the U.S.A. The array of states *other than their own* that at least 1-in-10 say they visited on pleasure trips over a two year period is extensive. Perhaps because at least one-tenth of Cultural Tourists have been to as many as seventeen (17) other states over the two-year period, few single states emerge as clear "winners".

As the exception, **Florida** attracted over 1-in-4 Cultural Tourists possibly because of the sun/sea activities available in this state. Florida's prominence as a destination contributes to the strong lure of **sun/sea** locations within the U.S., whether to see historic sites, museums, art galleries or to engage in other tourism experiences. Collectively, Florida, California, and Nevada attract approximately three-fifths of Cultural Tourists for out-of-state overnight pleasure trips.

On a destination-by-destination basis, **New York, California, Nevada** and the **District of Columbia** far outpace Alberta within the Cultural Tourism market when Americans elect to travel outside their home state. Consequently, these states represent substantive competition for Alberta's historical and heritage sites, museums and other cultural attractions, particularly in the current climate of passport uncertainty, unfavourable exchange rates and relatively high fuel prices.

A SAFE DESTINATION IS A PRIORITY.

Most Cultural 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 and one-sixth begin with the activities they want to enjoy while on their trip. The destination should be *safe*, have *many things for adults to see and do*, and pose *no health concerns*.

Most Cultural Tourists also accord a high level of importance to *convenient access by car*, suggesting that the classic American *road trip* is alive and well. Many of their destination choices support the importance of being able to drive to their destination. For example, they tend to travel within their own state or region and, if they live near the Canada-U.S.A. border, to the nearest province.²

Many also travel to more distant destinations – Canada, Europe, Asia and the like. For these long-haul trips, *direct air access* becomes important. Almost one-third of Cultural Tourists place a high level of importance on *direct air access* to an out-of-town destination when making their decision about where to travel. For the millions of Cultural Tourists who live long distances from Alberta, those indicating the importance of direct air access are more likely to be in the market for Alberta's cultural attractions and sites than are those wedded to driving trips.

ALBERTA FACES IMAGE BUILDING AND AWARENESS CHALLENGES IN THE AMERICAN CULTURAL TOURISM MARKET.

At 5.8 on a ten-point *appeal as a destination* scale among Cultural Tourists, Alberta faces *image-building* challenges. This score is significantly below U.S. market leaders such as Hawaii, California and Florida. It is also lower than neighbouring British Columbia (6.8), Ontario (6.6), Quebec (6.4), Prince Edward Island (6.2) and Nova Scotia (6.1). *Awareness-building* challenges among Cultural Tourists are clearly manifest in the finding that over one-third of U.S. Cultural 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 Cultural 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 8.0 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*.

² 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?*

CULTURAL TOURISTS ARE OUTDOOR *OBSERVERS* RATHER THAN *ADVENTURERS*.

The *outdoor* activity profile of Cultural Tourists suggests travellers 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-3 of these tourists on an *any participation* basis are limited to seeing well-known wonders, going to nature parks, sunbathing or sitting on a beach, viewing flora and/or fauna and camping.

Compared to Cultural Tourists as a whole, those with experience in Alberta over the past decade are much more likely to participate in a variety of outdoor activities, but like those in the sector overall, tend to observe the outdoors, focussing on seeing natural wonders, nature parks, plants and animals.

ARCHITECTURE AND PERFORMANCES ARE POPULAR TRIP ACTIVITIES.

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

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

ENTERTAINMENT, DINING AND SHOPPING ARE THINGS TO “SEE AND DO”.

Over two-fifths of Cultural Tourists have gone to fairs or festivals, theme parks, and/or casinos while on recent overnight pleasure trips with about one-third naming fairs/festivals and/or theme parks as a *trip motivator*. About one-quarter say they took a trip motivated by an interest in gambling (casinos) or going to a spectator sporting event, while close to two-fifths engaged in these as *one of many* activities on their trips. Attractions such as zoos, aquariums and movies are also included as *one of many* activities on trip itineraries for about 1-in-3 Cultural Tourists.

Similar to many entertainment-oriented activities, shopping, dining out at restaurants offering *local* cuisine, visiting local outdoor cafes and wine tasting are much more common trip experiences than trip drivers for Cultural Tourists.

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

Three-quarters of Cultural Tourists use the internet for travel information. Of the many other sources of information available to them, relatively few enjoy widespread use. About half of these tourists rely on their own past experience and/or anecdotal information provided by friends and relatives. Two-fifths include maps among their sources of travel information.

Use of official travel guides or brochures from provincial, state or national organizations is characteristic of one-third of Cultural Tourists, but is much more common among U.S. Travellers to Alberta. In fact, Cultural Tourists who have been to Alberta over the past decade seem to use more information sources than do members of the broader sector. Approximately half of them use official travel guides, newspapers and/or automobile clubs as sources of travel information.

UNFAVOURABLE ECONOMIC CONDITIONS AND BORDER CONTROL ISSUES MAKE IT DIFFICULT TO ATTRACT U.S. CULTURAL TOURISTS.

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.

These factors are compounded among American Cultural Tourists because, as relatively seasoned international travellers, they have many *alternative* destinations for their vacations – destinations with strong *cultural* infrastructure and fewer perceived barriers (e.g., U.S. states other than the state in which they reside, destinations within their state of residence, Europe, Mexico, etc.).

LOOK TO THOSE WHO HAVE BEEN TO ALBERTA TO GUIDE STRATEGIES FOR ATTRACTING MORE U.S. CULTURAL TOURISTS.

U.S. Travellers to Alberta can provide guidance for packaging and promoting Alberta for those who have yet to experience what Alberta has to offer. The following suggestions are, therefore, based on the demographic, attitudinal and behavioural profiles of these U.S. Travellers to Alberta.

- Showcase **unique** historic sites, re-enactments and art galleries – those that will differentiate Alberta’s cultural experiences from ones tourists can find in the U.S., Europe or other destinations;
- Package cultural attractions with *low energy* engagements with the **outdoors** (natural wonders, national/provincial parks) and a variety of things for

adults to see and do, including entertainment activities such as fairs or festivals, zoos, and casinos;

- Offer high quality **amenities** including mid-range accommodation and restaurants featuring local cuisine, possibly as part of organized tours or packages;
- Keep in mind that many Cultural Tourists are highly educated, have above average incomes and are widely travelled. As such, they are likely to bring high expectations of service and quality to cultural attractions and destinations;
- Focus on **warm weather** months because these older travellers are likely to go to sun/sea destinations during the winter;
- Use the **internet, newspapers, auto clubs and official travel guides or brochures** from provincial, state or national organizations to reach this *literate* 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 array of 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).³

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

ATPRC commissioned Research Resolutions & Consulting Ltd. to prepare the American tourist profiles. This profile describes **Cultural Tourists**.

³ See Appendix A for a brief description of the TAMS study

B. Defining American Cultural Tourists

This report provides information about **American Cultural 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 at least one of the following activities was the *main reason* for at least one of the overnight trips they took over this time period.⁴

Art galleries

Historic Sites

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

Museums

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

The primary focus is on Cultural Tourists as a whole, but where there are noteworthy differences between them, commentary is provided on *U.S. Travellers to Alberta* — the subset of Cultural Tourists who claim to have visited Alberta for any purpose over the past decade.⁵

Note to Readers

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

In other words, American Cultural Tourists claim to have taken an overnight trip motivated by a cultural activity in the past two years or so and to have taken overnight pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Thus, Cultural Tourists may or may not have been visiting a gallery, historic site or museum in a particular country, province or state they have visited recently for an overnight pleasure trip.

⁴ Since fieldwork for the TAMS study was conducted between January and June 2006, the “past two years” likely refers to 2004 and 2005. It is important to note, however, that when asked to report travel activities over a two-year period, consumers are prone to imprecision by focussing on “salient trips” (most memorable, most expensive, etc.) and/or by “telescoping” the specified time period (extending the time frame over which trips are reported beyond the specified two years). In light of this potential imprecision, a liberal interpretation of the “reference period” is advised. Throughout this report, the terms “past two years or so” and “recent” are commonly used to describe the “past two year” recall period.

⁵ See comments above on telescoping for a two-year recall period. Since the potential for imprecision increases as the recall period increases, readers are advised to interpret the “past ten years” liberally.

People who take a trip *in order to* engage in cultural tourism are only a fraction of tourists who go to museums, galleries and/or historic sites while on their vacations. In fact, approximately 81.8 million Americans say they have gone to these types of attractions on at least one of their trips over a two-year period.

Of these American pleasure tourists, almost one-third or about 25.2 million (31%) claim that they took a trip *in order to* go to a gallery, museum or historic site. These cultural enthusiasts – those for whom a cultural attraction is the main reason for a trip – are the focus of this report because as the “dedicated” or “passionate” market, they represent a crystallization of the interests and characteristics that might attract more casual participants to the activity.

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 Cultural Tourists

A. Market Segments

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

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

Cultural tourists are the largest single sector presented in this series of reports. These overnight pleasure tourists represent approximately one-eighth of *all* American adults (18 years of age or over) and over one-seventh of the U.S. overnight pleasure travel market, or 25.2 million people. Compared to the travelling public as a whole (15%), Cultural Tourists are over-represented among Americans who have been to Alberta over the past decade (25%).⁶

Historic Site Tourists – those who go to historic buildings or sites as the main reason for taking a trip dominate the sector, representing 3-in-4 Cultural Tourists. A further 1-in-2 of these travellers are **Museum Tourists**, claiming to have taken a trip in order to go to a museum (49%), and one-fifth have taken a trip to visit an **art gallery** (see Table 2).

⁶ See Detailed Tabulations, Volume 1, page 1 for sector size and share of U.S. population and overnight pleasure travellers.

Individual Activities

Of the many individual activities that could have motivated a holiday among Cultural Tourists, *well-known historic sites/buildings* is the most popular. This activity is identified as the main reason for a trip by half of the market sector (51%). *Other historic sites* are also widely cited as the reason for a recent overnight pleasure trip (38%). *General history museums* are trip drivers for over 1-in-4 Cultural Tourists. Approximately 1-in-5 sector members name *art galleries, historical replicas of cities or towns with re-enactments*, and *science/technology museums* as the main reason for a recent overnight pleasure trip.

U.S. Travellers to Alberta

For the most part, Cultural Tourists who have travelled in Alberta over the past decade resemble *all* American Cultural Tourists in terms of the cultural activities that motivate their recent trips. There are, however, two very noteworthy differences:

1. U.S. Travellers to Alberta are **significantly more likely take trips driven by archaeological/paleontological interests**⁷ (20% and 6%, respectively) than are U.S. Cultural Tourists as a whole (9%, and 2%, respectively); and
2. They are **twice as likely to seek Aboriginal heritage experiences** (21%) and, to a much lesser extent, *curatorial tours* (6%) than are Cultural Tourists in total (10% and 2%, respectively).

⁷ Note that more detailed analysis of tourists motivated by archaeological sites and digs is available in a separate report dedicated to travellers who take trips in order to engage in these activities.

TABLE 2: CULTURAL ACTIVITIES AS MAIN REASONS FOR OVERNIGHT TRIPS	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Art Galleries	19%	21%	19%
Historic Buildings/Sites	74%	79%	74%
Well-known historic sites, buildings	51%	50%	51%
Other historic sites, monuments, buildings	38%	42%	38%
Historical replicas of cities/towns with re-enactments	20%	23%	20%
Interpretative program at historic site or park	4%	8%	4%
Historical re-enactment (as an actor)	3%	3%	3%
Paleontological/archaeological sites	9%	20%	8%
Archaeological digs	2%	6%	2%
Museums	49%	55%	49%
General history	26%	29%	26%
Science/technology	18%	19%	18%
Military/war	16%	20%	16%
Children's	9%	5%	9%
Curatorial tours	2%	6%	2%
Aboriginal heritage attractions	10%	21%	9%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

B. Regional and Demographic Characteristics

1. Place of Residence

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

Cultural Tourists live in almost every state and are distributed across the United States in a manner that is very similar to the adult population and to the American overnight pleasure travel market as a whole. Thus, about 1-in-5 reside in the South Atlantic region, led by Florida; and about one-seventh live in each of the Mid-Atlantic, East North Central and Pacific regions.

By virtue of the size of their resident populations, **California, Texas, and New York**, followed by **Florida, Pennsylvania, and Illinois** are the largest single state contributors to the Cultural Tourism market.

U.S. Travellers to Alberta within the Cultural Tourist sector differ from sector members as a whole in their regional distribution across the United States. Specifically, they tend to be under-represented in markets more geographically *distant* from Alberta and over-represented in regions that are physically closer to the province. Thus, American Cultural Tourists with travel experience in Alberta are less likely to live in the eastern U.S.A., including the Middle Atlantic and East North Central regions, but are more apt to reside in the western U.S.A.

The **Pacific** states are home to about 1-in-6 adult Americans and Cultural Tourists (16% each) but more U.S. Travellers to Alberta live in the three Pacific states: California, Oregon or Washington (30%, combined). California is the most populated of the Pacific states, accounting for about 1-in-8 adult Americans (12%) but for 1-in-5 U.S. Travellers to Alberta within the Cultural Tourism sector (21%).

Each of the urban areas noted in Table 3 contributes to the market for Cultural Tourists and to the subset with travel experiences in the province. While no city generates more than 1-in-25 Cultural Tourists, Los Angeles, New York, Dallas and Houston top the list for the sector as a whole. San Francisco, Hartford and San Diego are also important urban markets among U.S. Travellers to Alberta.

TABLE 3: PLACE OF RESIDENCE	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
New England	5%	5%	5%
Massachusetts	2%	1%	2%
Connecticut	2%	3%	2%
Hartford	1%	2%	1%
New Haven	1%	1%	1%
Middle Atlantic	15%	7%	15%
New York State	7%	4%	7%
New York City	3%	2%	3%
Pennsylvania	5%	1%	5%
New Jersey	4%	2%	4%
Newark	1%	*	1%
East North Central	16%	13%	16%
Michigan	4%	3%	4%
Illinois	5%	4%	5%
Ohio	4%	2%	4%
West North Central	7%	7%	7%
Minnesota	2%	4%	2%
Missouri	2%	1%	2%
South Atlantic	19%	13%	19%
Georgia	4%	3%	4%
North Carolina	3%	1%	3%
Virginia	3%	2%	3%
Florida	6%	4%	6%
East South Central	6%	2%	6%
West South Central	11%	14%	10%
Texas	7%	8%	7%
Dallas	2%	2%	1%
Houston	2%	3%	2%
Mountain	6%	10%	6%
Colorado	1%	3%	1%
Arizona	2%	2%	2%
Utah	1%	1%	1%
New Mexico	1%	1%	1%
Pacific	16%	30%	15%
California	13%	21%	13%
Los Angeles	4%	3%	4%
San Francisco	1%	3%	1%
San Jose	1%	1%	1%
Sacramento	1%	1%	1%
San Diego	1%	2%	1%
Washington	2%	6%	2%
Oregon	1%	4%	1%

Source: TAMMS 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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade. *Less than 0.5%.

2. Personal and Household Characteristics

Age & Gender

Every age group is represented among Cultural Tourists. About 1-in-10 Americans in the sector are young adults (18 to 24 years) and almost twice this proportion is between 25 and 34 years of age or between 35 and 44 years of age (16%, each) (see Table 4). Over one-fifth are in their mid-forties to mid-fifties (22%) and over one-third are at least 55 years of age or older. Men and women are about equally likely to be Cultural Tourists.

Cultural Tourists' age profile is quite similar to *all* American adults and all overnight pleasure travellers, but differs from Americans who have taken an overnight trip to Alberta in the past decade. Those with direct experience in the province are older Americans. The majority of these U.S. Travellers to Alberta are at least 55 years of age (56%), compared to about one-third of Cultural Tourists in total (36%).

TABLE 4: AGE & GENDER	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Age			
18 – 24 Years	9%	4%	10%
25 – 34 Years	16%	11%	16%
35 – 44 Years	16%	12%	16%
45 – 54 Years	22%	17%	23%
55 – 64 Years	19%	21%	19%
65+ Years	17%	35%	16%
Gender			
Men	49%	50%	49%
18 – 34 Years	12%	9%	12%
35 – 54 Years	19%	14%	20%
55+ Years	18%	27%	18%
Women	51%	50%	51%
18 – 34 Years	13%	6%	14%
35 – 54 Years	19%	15%	20%
55+ Years	18%	29%	18%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

Race, Education, Occupation, and Income

Almost all American Cultural Tourists, like tourists who live in the U.S.A. as a whole, are Caucasian (see Table 5). They differ from the U.S. adult population and typical American tourists, however, in terms of their education, occupational status and income. Generally, those in the Cultural Tourist sector are more up-scale.

- They tend to be university educated, with almost half having at least one university degree (46%);
- They are apt to live in households with at least one person occupying an executive, managerial or professional position (34%); and
- Three-in-ten claim to have annual household incomes of at least \$100,000.

While they have more formal education, higher occupational status and higher incomes than typical American travellers, Cultural Tourists as a whole do not reach the level of education evident among Americans who are U.S. Travellers to Alberta. Three-fifths of sector members drawn to Alberta have graduated from university (60%). Possibly because they are more apt to be retired, U.S. Travellers to Alberta are, however, less apt than the typical Cultural Tourist to represent households with an executive, manager or professional labour force participant.

TABLE 5: RACE, EDUCATION, OCCUPATION, INCOME	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Race			
Caucasian	86%	87%	86%
African American	5%	2%	5%
Asian American	3%	5%	3%
Other/Not stated	7%	6%	7%
Education			
High school diploma or less	15%	10%	15%
Some post-secondary	27%	23%	28%
Post-secondary diploma or certificate	10%	5%	11%
University degree+	46%	60%	45%
Labour Force Participant¹			
Retirees	18%	34%	17%
Executive/Manager /Professional ²	34%	26%	34%
Household Income			
Under \$40,000	23%	12%	24%
\$40,000 - \$59,999	17%	22%	17%
\$60,000 - \$99,999	31%	32%	31%
\$100,000 - \$149,999	19%	20%	19%
\$100,000+	29%	33%	29%
\$150,000+	10%	14%	10%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Tables 36/38. *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 attending a cultural activity. *U.S. Travellers to Alberta* are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. *Non-Alberta Travellers* are Cultural Tourists with no trips to Alberta reported over the past decade.

¹ *Labour force participant* includes working full-time, part-time and self-employed. ² Male or female head of household.

3. Lifestage

Since lifestage is closely linked to an individual's age, it is not surprising that with over half of Cultural Tourists in the 25 to 54 year age group, many are in the *parenting* years (49%) (see Table 6). The lifestage of the U.S. Travellers to Alberta segment also reflects their age: more than half of these tourists are in the 55 or over age cohort and, correspondingly, about half of them are living as *couples* and most particularly, *older retired couples*.

On average, Cultural Tourists live in households of about three people (2.9). Consistent with their age and propensity to live as *couples*, those who have been to Alberta over the past decade live in somewhat smaller households (2.5).

TABLE 6: HOUSEHOLD CHARACTERISTICS	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
HOUSEHOLD SIZE			
1 person	12%	12%	12%
2 people	37%	52%	36%
3 person	19%	15%	19%
4 people	19%	12%	19%
5+ people	13%	7%	13%
Average (all ages)	2.9	2.5	2.9
LIFESTAGE¹			
Young singles	3%	3%	3%
Middle singles	6%	6%	6%
Older singles	4%	3%	4%
Young couple	10%	10%	10%
Working older couple	15%	17%	15%
Retired older couple	11%	26%	10%
Young parent	10%	4%	10%
Middle parent	10%	5%	10%
Older parent	29%	21%	30%
Any singles	12%	12%	12%
Any couples	36%	52%	35%
Any parent	49%	30%	49%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

¹Lifestage 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 Cultural Tourists indicated that they have taken recent vacations within the U.S.A. and over half claim to have travelled *only* within their own country (55%) (see Table 7). Even among Cultural Tourists who have been to Alberta within a ten year period, almost one-quarter have confined their recent overnight pleasure trips to locations within the U.S.A. (23%).

One-fifth of American Cultural Tourists have been to Canada on a recent overnight pleasure trip (20%). 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 as a destination for these culture enthusiasts.⁸

Not only have Cultural Tourists been to *Canada* at a higher rate than most American pleasure travellers, but they have also been to *other countries* at a much higher rate: 34% for Cultural Tourists compared to 26% of all U.S. overnight pleasure tourists. In fact, they have recently travelled to Europe (14%) at twice the rate evident for typical American pleasure tourists (7%).⁹

A penchant for travel to destinations *outside* the U.S.A. is especially evident among **U.S. Travellers to Alberta**. Over 1-in-2 of these tourists have recently travelled in Canada (55%) and 1-in-3 have been to Europe in the past two years or so (34%). Slightly fewer have been to destinations in Mexico (26%) and/or the Caribbean (21%).

Note to Readers

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

In other words, American Cultural Tourists claim to have taken an overnight trip motivated by cultural attractions in the past two years or so and to have taken overnight pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Thus, Cultural Tourists may or may not have been to a historic site or museum in a particular country, province or state they have visited recently for an overnight pleasure trip.

⁸ See Detailed Tabulations, Volume 1, Table 49 for *all U.S. overnight pleasure traveller* figures.

⁹ See note #8, above.

TABLE 7: COMPETITIVE DESTINATIONS WORLDWIDE*	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Canada	20%	55%	18%
U.S.A.	99%	99%	99%
Other Countries (NET)	34%	58%	33%
Mexico	14%	26%	13%
Caribbean	13%	21%	13%
Europe	14%	34%	13%
South/Central America	4%	10%	4%
Asia	4%	9%	4%
Africa	1%	5%	1%
Australia/New Zealand	2%	6%	1%
Destination patterns			
Only U.S.A.	55%	23%	57%
U.S.A. & Canada only	10%	19%	10%
U.S.A. & Mexico only	5%	5%	5%
U.S.A. & Canada & Other Countries	10%	37%	8%
U.S.A. & Other Countries only (not Canada or Mexico)	14%	11%	14%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

B. Canadian Destinations

As noted earlier, approximately 1-in-20 Cultural Tourists have had some travel experience in Alberta over a ten-year period (5%), but less than half this proportion (2%) has 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 (32%) than is the case among the sector as a whole (2%). As noted earlier, however, these recent visitors to Alberta may or may not have visited a heritage site, museum or archaeological dig in Alberta or any other specific destination they claim to have visited recently.

Ontario is the principle Canadian competitor for these American Cultural Tourists. Over a two-year period, this central Canadian province attracted about six times as many Cultural Tourists (12%) as did Alberta (2%). 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 the province is relatively scarce.¹⁰

Among U.S. Travellers to Alberta, Alberta is the Canadian province most apt to have been an overnight pleasure trip destination in the past two years (32%). At parity with Alberta, British Columbia (32%), followed by Ontario (26%) are, however, also popular destinations with this subset of Cultural Tourists (for additional information on the relative appeal of Alberta and British Columbia among residents of Pacific states, please see the following page).

¹⁰ 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 cultural pursuits clearly suggest that:

- Alberta is more successful at attracting 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 more successful in attracting *generic* tourists from the California and Washington than it has been in drawing Cultural Tourists from these states; and
- British Columbia is appreciably more successful than is Alberta in capturing market share from the Pacific Region (50%) and most particularly from California (24%) and neighbouring Washington State (20%).

PLACE OF RESIDENCE	All U.S. Pleasure Travellers to . . .			U.S. Cultural Tourists to Alberta (past 10 years)
	Any Destination (past 2 years)	British Columbia (past 2 years) ¹¹	Alberta (past 10 years)	
Pacific Region	16%	50%	26%	16%
California	13%	24%	17%	13%
Washington	2%	20%	6%	2%
Oregon	1%	Not Available	3%	4%

¹¹ 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).

TABLE 8: CANADIAN DESTINATIONS*	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Alberta			
Any purpose, past 10 years	5%	100%	-
Any purpose, past 2 years	2%	41%	-
Pleasure, past 2 years	2%	32%	-
Overnight Pleasure Trips in Past 2 Years to . . .			
Atlantic Canada	3%	11%	3%
Quebec	5%	12%	5%
Ontario	12%	26%	11%
Man/Sask	1%	14%	1%
British Columbia	5%	32%	4%
Yukon	1%	7%	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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

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

To identify Alberta's *competitive* destinations *within* the U.S., this analysis focuses on the "other" states Cultural Tourists elect to visit for overnight pleasure trips. Thus, Table 9 displays destinations in states other than the one in which a Cultural Tourist lives. Limited information on state destinations of these travellers including the one in which they live is available on the following page.¹²

Not only are Cultural Tourists and the U.S. Travellers to Alberta subset of this market widely travelled *internationally*, but also they are widely travelled *within* the U.S.A. At least one-tenth of them have taken overnight pleasure trips to as many as seventeen (17) *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 only one state – Florida – emerges as the clear "winner" as an out-of-state destination for Cultural Tourists.

Florida attracted over 1-in-4 Cultural Tourists (27%) possibly because of the sun/sea activities available in this state. Florida's prominence as a destination contributes to the strong lure of **sun/sea** locations within the U.S., whether to see historic sites, museums, art galleries or to engage in other tourism experiences. Collectively, these destinations, including Florida, California, and Nevada attract three-fifths of Cultural Tourists for out-of-state overnight pleasure trips (60%).

The popularity of sun/sea destinations among Cultural Tourists is consistent with their older demographic profile. Some of them and especially those who live in the northern U.S.A. are likely seeking warm respites during the winter months. Their comparatively *low key, low energy* outdoor activity preferences including sitting on a beach or swimming in oceans are also consistent with the activities offered in sun/sea states (see Section V.B.2 for outdoor activities). In turn, Nevada's particular appeal is undoubtedly associated with some Cultural Tourists' interest in gambling as a trip activity.

On a destination-by-destination basis, **New York, California, Nevada** and the **District of Columbia** each attracted fewer than 1-in-5 members of this market segment over two years. Nonetheless, these American destinations far outpace Alberta within the Cultural Tourism market when Americans elect to travel outside their home state. Consequently, they represent substantive competition for Alberta's historical and heritage sites, museums and other cultural attractions, particularly in the current climate of passport uncertainty and exchange rates.

¹² For the full list of states visited, see Detailed Tabulations, Volume 1, Table 49.

A very similar pattern is evident for U.S. Travellers to Alberta. Like the Cultural Tourist sector as a whole, these tourists have been to many different states over a two-year period. In fact, at least one-tenth of them have visited over forty states apart from their “own”.¹³ Compared to the sector as a whole, U.S. Travellers to Alberta display an even more marked interest in **sun/sea** destinations (76%), with **California, Florida, Arizona, New York, Nevada, Colorado** and **Texas** at the top of their out-of-state destination list.

<u>Destinations</u>	Cultural Tourists			
	<u>Excluding State Residents</u>		<u>Including State Residents¹⁴</u>	
	Total	U.S. Travellers to Alberta	Total	U.S. Travellers to Alberta
Florida	27%	32%	31%	35%
New York State	18%	25%	22%	27%
California	17%	34%	28%	49%
Nevada	16%	24%	17%	25%
Washington, D.C.	16%	19%	16%	19%
Arizona	13%	28%	14%	30%
Illinois	12%	21%	15%	22%
Colorado	10%	23%	11%	27%
Texas	10%	22%	15%	29%

To assess the impact of state residents travelling *within* their own state, the U.S. destination choices of Cultural Tourists and the U.S. Travellers to Alberta subset are shown above, *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-quarter of the entire American Cultural Tourist market and one-half of those who have taken trips to Alberta over the past decade (on trips that may or may not have included engaging in a cultural activity). Based on these findings, it seems clear that Alberta is competing with California as a destination both for California *residents* and for the Cultural Tourists who *live in other U.S. states*.

¹³ See Detailed Tabulations, Volume 1, Table 50 for the full list of out-of-state destinations.

¹⁴ See Detailed Tabulations, Volume 1, Table 49.

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

	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Sun/Sea States (S)	60%	76%	59%
<i>In rank order by Cultural Tourists</i>			
Florida (S)	27%	32%	27%
New York State	18%	25%	17%
California (S)	17%	34%	16%
Nevada (S)	16%	24%	16%
Washington, D.C.	16%	19%	16%
Pennsylvania	15%	17%	15%
Arizona (S)	13%	28%	12%
Tennessee	13%	16%	13%
Virginia	13%	17%	13%
Georgia	12%	15%	12%
Illinois	12%	21%	12%
North Carolina	11%	13%	11%
Colorado	10%	23%	9%
Massachusetts	10%	18%	10%
Ohio	10%	13%	10%
South Carolina	10%	9%	10%
Texas (S)	10%	22%	9%
Indiana	8%	12%	8%
Wisconsin	7%	14%	6%
Wyoming	5%	14%	5%

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 Cultural Tourists or the subset of U.S. Travellers to Alberta. "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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

D. Destinations: Roles & Ratings

1. Importance of Destination

As they say in retail, destination, destination, destination! For two-thirds of U.S. Cultural Tourists and those who are U.S. Travellers to Alberta, 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 start their trip planning process with a focus on the **type of vacation experience** they wish to have and about one-sixth begin with the **activities** they want to enjoy while on their trip.

These levels of experience-driven and activity-driven planning are about on par with the American overnight pleasure travel market as a whole. Cultural Tourists also put a premium on **destination choice** *per se*, with over 7-in-10 claiming that it is *extremely* or *very important* to them. A similar level of importance is accorded destination *per se* by the subset of Cultural Tourists with visits to Alberta over the past decade.

TABLE 10: CONSIDERATIONS/ IMPORTANCE OF DESTINATION

	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
First Consideration for Most Recent Summer/Winter Trip (NET)*			
Start with destination	65%	67%	65%
Start with activities	16%	15%	16%
Start with type of vacation experience	21%	21%	21%
Look for package deal	3%	3%	3%
Importance of Destination			
Extremely/Very Important (SUM)	72%	78%	72%
Extremely important	33%	34%	33%
Very important	39%	44%	39%
Average**	4.0	4.1	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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

2. 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.¹⁵

On balance, Cultural 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. Like other American tourists, members of this sector put *feeling safe* (73%) at the top of their list (see Table 11). Over half of them seek a destination with *many things for adults to see and do* (55%). About the same proportion want *convenient access by car* to their destination (52%), suggesting that the classic American *road trip* remains alive and well for most of these tourists. Many of their destination choices support the importance of being able to drive to their destination. For example, they tend to travel within their own state or region and, if they live near the Canada-U.S.A. border, to the nearest province.¹⁶

Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Cultural Tourists/U.S. Travellers to Alberta

	Cultural Tourists		All U.S. Pleasure Tourists
	Total	U.S. Travellers to Alberta	
Feeling safe	73%	65%	73%
Lots for adults to see/do	55%	54%	48%
Convenient access by car (to destination)	52%	46%	51%
No health concerns	44%	39%	43%
Mid-range accommodation	37%	41%	33%
Direct access by air (to destination)	30%	38%	26%

Two-fifths also place high importance on a destination that poses *no health concerns* (44%) and over one-third seek destinations offering *mid-range lodging*. Close to this proportion also want their destinations to have *direct air access* – a characteristic that is slightly more prominent among U.S. Travellers to Alberta (38%) than among Cultural Tourists as a whole (30%). These are likely to be the Cultural Tourists who

¹⁵ “Highly important”, “Somewhat important”, and “Of no importance”.

¹⁶ 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?*

travel to more distant destinations – Canada, Europe, Asia and the like. For these long-haul trips, *direct air access* becomes important. For the millions of Cultural Tourists who live long distances from Alberta, those indicating the importance of direct air access are more likely to be in the market for Alberta's cultural attractions and sites than are those wedded to driving trips.

Other conditions almost 1-in-3 Cultural Tourists value when making destination choices include availability of *information on the internet, budget accommodation, and/or low cost travel packages*. Note that the importance accorded varying grades of lodging, from campsites and budget lodging through luxury accommodation, reflects the diversity of the U.S. Cultural Tourist 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, almost 1-in-4 Cultural Tourists have annual household incomes under \$40,000. These relatively low income Americans tend *not* to be those who have travelled to Alberta.

U.S. Travellers to Alberta closely resemble Cultural Tourists as a whole in terms of the conditions they deem highly important in their destination choices. Nonetheless, those who have been to the province in the past decade seem somewhat more adventuresome: they are half as likely to place a high level of importance on a destination where they would be *familiar with the language and culture* (10%) than are Americans in the sector as a whole (21%). 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.

TABLE 11: CONDITIONS FOR SELECTING A DESTINATION

	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
<i>Bold rows are proportion stating "Highly Important". In rank order by Cultural Tourists</i>			
Feeling safe	73%	65%	73%
Of no importance	2%	3%	2%
Lots for adults to see/do	55%	54%	55%
Of no importance	4%	4%	4%
Convenient access by car (to destination)	52%	46%	52%
Of no importance	8%	10%	7%
No health concerns	44%	39%	44%
Of no importance	14%	13%	14%
Mid-range accommodation	37%	41%	37%
Of no importance	10%	8%	10%
Low cost packages available	31%	23%	32%
Of no importance	19%	27%	19%
Information available on internet	31%	25%	31%
Of no importance	22%	30%	22%
Direct access by air (to destination)	30%	38%	30%
Of no importance	23%	15%	23%
Budget accommodation	30%	23%	30%
Of no importance	21%	28%	21%
Familiar with culture & language	21%	10%	22%
Of no importance	18%	23%	17%
Lots for children to see/do	19%	11%	19%
Of no importance	59%	69%	58%
Great shopping	17%	13%	17%
Of no importance	35%	45%	34%
Very different culture than own	12%	14%	12%
Of no importance	38%	28%	39%
Convenient access by train/bus (to destination)	12%	13%	11%
Of no importance	48%	43%	49%
Have friends or relatives there	10%	8%	11%
Of no importance	60%	64%	60%
Disabled-person-friendly	10%	8%	10%
Of no importance	69%	73%	69%
Luxury accommodation	10%	10%	10%
Of no importance	52%	52%	52%
Camping	10%	10%	10%
Of no importance	64%	62%	64%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

3. Appeal of Various Destinations

American Cultural 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).¹⁷ Though significantly lower than Hawaii, moderately favourable ratings are accorded a host of destinations, including California (7.5), Colorado (7.3), and Florida (7.2).

At 5.8 among Cultural Tourists, Alberta is rated significantly below New York State, Arizona and neighbouring British Columbia and most central and Atlantic Canada provinces. Furthermore, over one-third of U.S. Cultural Tourists refrain from rating the province, presumably because they know too little about Alberta to offer an opinion about its touristic appeal.

Summary: Highest Appeal Destinations among Cultural Tourists/U.S. Travellers to Alberta

	Cultural Tourists		All U.S. Pleasure Tourists
	Total	U.S. Travellers to Alberta	
Hawaii	8.4	8.5	8.4
California	7.5	7.7	7.3
Colorado	7.3	7.9	7.1
Florida	7.2	7.0	7.3
New York State	6.9	7.2	6.6
Arizona	6.9	7.4	6.6
British Columbia	6.8	8.6	6.2
Ontario	6.6	7.3	6.1
Quebec	6.4	7.3	5.8
Prince Edward Island	6.2	7.4	5.6
Nova Scotia	6.1	7.4	5.5
Alberta	5.8	8.0	5.2

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 8.0, positioning it behind Hawaii and British Columbia, on par with Colorado and

¹⁷ 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.

California and ahead of virtually every other Canadian destination. The challenge, of course, is in getting more of these cultural enthusiasts to the province!

TABLE 12: APPEAL OF VARIOUS DESTINATIONS

	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
<i>Bold rows are average ratings*</i>			
Alberta	5.8	8.0	5.6
No rating provided	35%	5%	37%
Newfoundland & Labrador	5.3	6.6	5.2
No rating provided	38%	20%	39%
Nova Scotia	6.1	7.4	6.0
No rating provided	30%	13%	31%
New Brunswick	5.5	6.7	5.4
No rating provided	39%	17%	40%
Prince Edward Island	6.2	7.4	6.1
No rating provided	33%	18%	34%
Quebec	6.4	7.3	6.4
No rating provided	23%	7%	23%
Ontario	6.6	7.3	6.6
No rating provided	21%	8%	21%
Manitoba	5.2	6.3	5.1
No rating provided	40%	20%	41%
Saskatchewan	5.2	6.4	5.1
No rating provided	38%	20%	39%
British Columbia	6.8	8.6	6.7
No rating provided	27%	8%	28%
Yukon	5.5	6.7	5.5
No rating provided	33%	18%	34%
Northwest Territories	5.6	6.4	5.5
No rating provided	33%	24%	33%
New York State	6.9	7.2	6.9
No rating provided	8%	5%	8%
Colorado	7.3	7.9	7.3
No rating provided	10%	5%	10%
Florida	7.2	7.0	7.3
No rating provided	5%	3%	5%
California	7.5	7.7	7.4
No rating provided	6%	2%	6%
Hawaii	8.4	8.5	8.4
No rating provided	7%	5%	7%
Arizona	6.9	7.4	6.9
No rating provided	8%	2%	9%

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 attending a cultural activity. *U.S. Travellers to Alberta* are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. *Non-Alberta Travellers* are Cultural Tourists with no trips to Alberta reported over the past decade.

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 Cultural Tourists' lists for having *many good reasons* to visit on a pleasure trip (see Table 12).¹⁸ 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 about one-seventh of Cultural Tourists (14%) 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 Cultural Tourists. The ranking of destinations with *many good reasons to visit* is essentially the same for members of the Cultural Tourism sector as it is for the U.S. pleasure market as a whole.

In contrast, those Cultural Tourists who are U.S. Travellers to Alberta are significantly more likely to position Alberta as a destination with many good reasons to visit. Over half describe the province in this manner (54%), putting it about on par with Colorado, but below Hawaii, neighbouring British Columbia and California. 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.

Summary: Destinations With At Least One-Half Saying *Many Good Reasons to Visit* (in rank order within each category)¹⁹

Cultural Tourists					
Total		U.S. Travellers to Alberta		All U.S. Pleasure Tourists	
Hawaii	69%	Hawaii	69%	Hawaii	67%
California	57%	British Columbia	66%	Florida	54%
Florida	55%	California	60%	California	53%
		Colorado	56%		
Alberta	14%	Alberta	54%	Alberta	10%

¹⁸ 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*.

¹⁹ See Table 13 for the full array of ratings.

TABLE 13: NUMBER OF REASONS TO VISIT
VARIOUS DESTINATIONS

	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
<i>% stating "MANY" good reasons to visit</i>			
Alberta	14%	54%	11%
<i>Rank order among Cultural Tourists</i>			
Hawaii	69%	69%	69%
California	57%	60%	57%
Florida	55%	44%	55%
New York State	47%	46%	47%
Colorado	46%	56%	45%
Arizona	36%	40%	36%
British Columbia	29%	66%	27%
Ontario	27%	41%	26%
Quebec	26%	44%	25%
Nova Scotia	19%	39%	18%
Prince Edward Island	19%	41%	17%
Northwest Territories	15%	26%	14%
Yukon	15%	32%	14%
New Brunswick	11%	25%	10%
Newfoundland & Labrador	11%	24%	10%
Saskatchewan	9%	15%	8%
Manitoba	8%	13%	7%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

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*.²⁰

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

“Main Reason” and “Any Participation”

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

²⁰ Presumably, “these trips” are those on which the specific activity took place.

B. Trip Activities & Drivers

1. Major Trip Activity Groups

Like most tourists, Cultural Tourists take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors (see Table 14).²¹

- In addition to taking trips in order to go to historic sites or museums, over half of these Americans take trips in order to engage in at least one **land-based outdoor activity** such as camping, hiking, bird watching or viewing land-based animals.
- Two-fifths have taken recent overnight pleasure trips in order to engage in a **water-based outdoor activity** including fishing, diving, snorkelling, river rafting and canoeing; **entertainment** activities such as theme parks, casinos and movies; to stay in a resort, campground or lodge (**lodging**); and/or have taken trips to enjoy **dining and wine-related** experiences.
- **Fairs and Festivals** are trip motivators for about 1-in-3 Cultural Tourists.²²
- At least one-quarter of these Cultural Tourists say they have taken holidays to go to **spectator sporting events** such as professional baseball or football games or to **shop**.
- **Cultural performances** attract about one-fifth of Cultural Tourists as a trip motivator.

In many respects, U.S. Travellers to Alberta resemble *all* Cultural Tourists in 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 land-based animals as trip drivers increase from about half of all Cultural Tourists to about three-quarters of U.S. Travellers to Alberta;
- **lodging-based activities** such as staying at a resort, lodge or campsite are trip motivators for over one-half of U.S. Travellers to Alberta but only about two-fifths of Cultural Tourists in total;

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

²² Includes more events than are used to define the Fairs & Festivals sector.

- **Aboriginal cultural activities** or events and **outdoor winter activities** such as alpine skiing are twice as likely to prompt overnight trips among U.S. Travellers to Alberta (25% and 20%, respectively) as they are among all Cultural Tourists (14% and 12%, respectively).

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 Cultural Tourists as a whole and those who are U.S. Travellers to Alberta.

For example, more Cultural Tourists *participated* in at least one land-based outdoor activity while on a recent overnight pleasure trip (75%) than claim to have taken a trip motivated by one of these activities (54%) but the most dramatic shifts are associated with dining and shopping. Food and wine experiences are, in effect, “one-of-many” trip activities for almost all Cultural Tourists (86%) but the driving force behind a trip for fewer segment members (40%). Similarly, 8-in-10 Cultural Tourists say that they went shopping on a recent trip but only about 1-in-4 of them took the trip *in order to* shop.

Compared to *all* U.S. overnight pleasure travellers, Cultural Tourists and especially those who are U.S. Travellers to Alberta 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.²³

<u>Major Activity Group</u>	<u>Main Reason</u>			<u>Any Participation</u>		
	<u>Cultural Tourists</u>		All U.S. Pleasure Tourists	<u>Cultural Tourists</u>		All U.S. Pleasure Tourists
	Total	U.S. Travellers to Alberta		Total	U.S. Travellers to Alberta	
Outdoor Land-Based	54%	73%	30%	75%	85%	63%
Theme/Amusement Parks	42%	40%	22%	58%	60%	43%
Food/Wine	40%	48%	13%	86%	93%	74%
Art Galleries	19%	21%	3%	33%	44%	15%

²³ For more information on U.S. pleasure tourists in total, see Detailed Tabulations, under separate cover.

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

- Cultural Tourists and especially those who have demonstrated a willingness to travel to Alberta are *multi-dimensional* tourists.
- They may place particular emphasis on *cultural activities* for some of their trips, but many also take trips in order to have low-energy encounters with the outdoors, enjoy local and internationally acclaimed cuisine or wine tasting, attend music or theatre performances and stay at resorts or lodges. Packaging and marketing cultural experiences and activities consistent with these *other* interests may be particularly successful.
- The contrast between the very high levels of participation in dining and shopping and appreciably lower levels of trips motivated by these activities suggests that Cultural Tourists may require assurances that they will have opportunities to shop and have fine dining experiences while on a culturally-focussed trip.
- Upscale and older Cultural Tourists 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 nature-based products, winter outdoor experiences and especially alpine skiing and/or Aboriginal experiences with other cultural activities might have special appeal to niche groups within the U.S. Cultural Tourist market.

TABLE 14: MAJOR ACTIVITY GROUPS
- MAIN & ANY

	Cultural Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(6,760)	(6,760)	(365)	(365)
Weighted, Projected	25,179,000	25,179,000	1,322,000	1,322,000
Historic Sites/Buildings	72%	83%	73%	87%
Outdoor Land Based Activities	54%	75%	73%	85%
Museums	44%	66%	47%	74%
Outdoor Water Based Activities	43%	61%	43%	62%
Theme/Amusement Parks/Movies (Entertainment)	42%	58%	40%	60%
Lodging (Lodges, Resorts, etc.)	41%	62%	53%	78%
Food & Wine	40%	86%	48%	93%
Fairs/Festivals (Any*)	34%	57%	38%	68%
Spectator Sports	27%	36%	28%	41%
Shopping	27%	81%	30%	90%
Performing Arts	20%	35%	24%	48%
Art Galleries	19%	33%	21%	44%
Aboriginal Culture/Events	14%	21%	25%	39%
Outdoor Winter Activities	12%	17%	20%	25%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. *Includes more events than are used to define the Fairs & Festivals sector.

2. Individual Trip Activities: The Outdoors

When taken as a whole, the *outdoor* activity profile of **Cultural Tourists** suggests individuals who *observe* rather than *interact* with nature (see Table 15).²⁴ Outdoor activities that attract at least 1-in-4 of these tourists on an *any participation* basis are limited to seeing well-known wonders, going to nature parks, sunbathing or sitting on a beach, swimming in oceans, viewing flora and/or fauna, hiking and/or camping. Of these activities, natural wonders and nature parks are most apt to be trip drivers (*main activity*).

Compared to the sector as a whole, U.S. Travellers to Alberta are much more likely to participate in a variety of outdoor activities, but like the larger cultural segment, tend to observe the outdoors, focussing on seeing natural wonders, nature parks, plants and animals, camping and taking day hikes. As noted in the previous section, American Cultural Tourists most apt to be drawn to Alberta are older than the typical tourist. As such, encounters with the outdoors included in culturally oriented packages or promotions should respect their stamina and energy levels.

TABLE 15: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY*

	Cultural Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(6,760)	(6,760)	(365)	(365)
Weighted, Projected	25,179,000	25,179,000	1,322,000	1,322,000
Well-known natural wonders	29%	42%	45%	65%
Nature park	27%	42%	46%	56%
Sunbathing or sitting on a beach	21%	35%	19%	38%
Camping	19%	31%	27%	43%
Public campground	15%	25%	23%	35%
Swimming in oceans	17%	33%	13%	33%
Flora/fauna viewing	16%	33%	32%	54%
Wildlife viewing – land based animals	11%	22%	22%	41%
Whale watching	7%	14%	21%	31%
Wildflowers/flora	6%	17%	12%	29%
Bird watching	5%	12%	11%	23%
Hiking – Day excursions	11%	26%	15%	40%

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 attending a cultural activity. *U.S. Travellers to Alberta* are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. *Activities shown here are those that are named by at least 1-in-4 Cultural 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.

²⁴ For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

3. Individual Trip Activities: Culture and Entertainment

By definition, Cultural Tourists take trips *in order to* engage in various historical and cultural activities such as seeing historic sites and going to museums or art galleries (see Section III-A, page 16 for a discussion of the individual trip motivators used to define Cultural Tourists). They are also motivated to take trips in order to see cities' architecture (34%), and to a lesser degree, to attend concerts, plays and other arts performances (20%) (see Table 16).

In addition to these culturally-oriented activities, the majority of Cultural Tourists have recently taken overnight pleasure trips with an entertainment focus (71%). The most popular entertainment trip drivers are fairs or festivals including country fairs or farmers' markets (34%), amusement parks (33%), spectator sporting events (27%) and casinos (25%). These, along with many other entertainment activities are, however, more apt to constitute *things to see and do* than the *motivation* for overnight trips.²⁵

Culture – Any Participation

Even more Cultural Tourists engage in the cultural activities used to define the sector as “one-of-many” trip activities than are motivated to take overnight pleasure trips in order to engage in these activities. For example, 5-in-10 have taken a trip primarily to visit a *well-known historic site* (51%, main) but 7-in-10 have gone to such a site on a recent holiday (69%, any). Similarly, 2-in-10 Cultural Tourists took trips primarily to visit an *art gallery* while over 3-in-10 went to an art gallery as one of their activities on a recent trip. The same enthusiasm is evident for visiting *museums*, including those dedicated to general history or to science/technology.

Other cultural activities are also trip drivers for Cultural Tourists. One-third indicate that they have taken a holiday primarily in order to *stroll around a city to observe its buildings and architecture* (34%, main) and even more have done so as part of a recent pleasure trip (57%, any). Attending *arts performances* such as live theatre, classical music concerts, opera or ballet is a trip driver for one-fifth of Cultural Tourists and a trip activity for about one-third.

Entertainment – Any Participation

As noted above, most Cultural Tourists have taken overnight pleasure trips in order to engage in various entertainment activities (71%, main) and almost all have participated in such activities on recent holidays (90%, any). Fairs and festivals (57%) including farmers' markets and firework displays, amusement parks (45%), casinos (43%) and

²⁵ For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

movies (38%) are particularly popular *things to see and do* while on overnight holidays (*any participation*).

U.S. Travellers to Alberta

Enthusiasm for some cultural attractions and entertainment activities as *one-of-many* on recent pleasure trips (*any*) is even more pronounced among U.S. Travellers to Alberta than it is among Cultural Tourists as a whole. The differences are highlighted when participation rates are indexed. The extent to which the index score is greater than 100 is the extent to which U.S. Travellers to Alberta are more apt to engage in a particular activity while on overnight pleasure trips (*any*) than are Cultural Tourists as a whole. The closer the index score is to 100, the closer to parity the two groups are.

As evident in the following table, Cultural Tourists with Alberta experiences over the past decade are especially apt to include historic replicas, archaeological sites, military museums and Aboriginal heritage attractions as activities on their recent overnight pleasure trips.

Index: Any Participation by All Cultural Tourists versus U.S. Travellers to Alberta

CULTURAL ACTIVITIES

Historic sites - well-known	116
Historic sites – other	125
Historic replicas with re-enactments	214
Paleontological/archaeological sites	175
Archaeological digs	133
Art galleries	112
General history museum	120
Science/technology museum	121
Military/war museum	213
Aboriginal heritage attractions	225
Curatorial tours	137
Performing Arts (any)	140
Strolling around a city to see architecture	101

ENTERTAINMENT

Fairs/Festivals	123
Amusement parks	109
Casinos	121

- The vast array of cultural and entertainment activities engaged in by Cultural Tourists attests to their eclectic and wide-ranging interests. They describe themselves as tourists who want to return home from their trips feeling that they

have *seen and done something new and different*.²⁶ Thus, when marketing Alberta's cultural attractions to them, consideration might be given to a *menu* that highlights Alberta's unique sites and attractions and the activity choices of Cultural Tourists who have already been to Alberta.

- Such a menu might include Aboriginal cultural events, explorations of military history and/or historical military re-enactments, general history or science museum visits that include curatorial tours, and/or side trips to archaeological or palaeontology sites.
- On the lighter side and to provide evening entertainment, casinos, fireworks displays, theatre or music performances might also be included on the menu. The menu concept might convey to potential Cultural Tourists that Alberta offers *many things for adults to see and do* – a highly important factor in destination selection for these tourists.²⁷

²⁶ See Section VII.B: *Benefits Sought From Pleasure Travel* for details.

²⁷ See Section III.D.2: *Importance of Conditions in Destination Choice* for details.

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

	Cultural Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(6,760)	(6,760)	(365)	(365)
Weighted, Projected	25,179,000	25,179,000	1,322,000	1,322,000
<i>In rank order by main reason within each subgroup</i>				
Cultural Activities				
Historic sites/buildings (any)	72%	83%	73%	87%
Historic sites - well-known	51%	69%	50%	79%
Historic sites – other	38%	58%	42%	67%
Historic replicas with re-enactments	20%	28%	23%	35%
Paleontological/archaeological sites	9%	14%	20%	30%
Archaeological digs	2%	4%	6%	7%
Art galleries	19%	33%	21%	44%
Museums (any)	44%	66%	47%	74%
General history museum	26%	46%	29%	54%
Science/technology museum	18%	30%	19%	36%
Military/war museum	16%	28%	20%	34%
Aboriginal heritage attractions	10%	16%	21%	34%
Curatorial tours	2%	4%	6%	9%
Performing Arts (any)	20%	35%	24%	48%
Live theatre performances	13%	25%	19%	35%
Strolling around a city to see architecture	34%	57%	39%	66%
Entertainment (any)	71%	90%	69%	91%
Fairs/Festivals	34%	57%	38%	68%
Firework displays	12%	26%	11%	31%
Farmers' markets or country fairs	14%	30%	12%	37%
Amusement parks	33%	45%	31%	44%
Casinos	25%	43%	24%	47%
Zoos	19%	34%	22%	41%
Aquariums	18%	34%	21%	39%
Movies/cinema	13%	38%	12%	42%
Free outdoor performances	11%	25%	8%	30%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Activities shown here are those that are named by at least 1-in-4 Cultural 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.

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

Lodging

Resorts, and most particularly seaside resorts, drive trips for over one-quarter of Cultural Tourists (main) and are used for lodging by close to one-half of these travellers (any) (see Table 17). Seaside resort experiences are more widely sought than are those available in Alberta – ski or mountain resorts (8% *main*; 14% *any*) or wilderness lodges (5% *main*; 8% *any*).

Among U.S. Travellers to Alberta, however, there is much more pronounced interest in lodging experiences in general and the types of resorts or lodging available in Alberta than is the case for Cultural Tourists as a whole. In fact, U.S. Travellers to Alberta are about twice as likely to take a trip in order to stay in a wilderness or remote lodge or a ski/mountain resort as are Cultural Tourists in general.

Food & Wine

Collectively, food and wine activities drive trips for 4-in-10 Cultural Tourists and almost 5-in-10 U.S. Travellers to Alberta. 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 both Cultural Tourists and those who are U.S. Travellers to Alberta.

Shopping

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

Shopping and dining experiences are clearly in high demand among Cultural 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 Cultural Tourist market may also respond to a wilderness lodge or ski or mountain resort experience combined with one or more cultural activities.

TABLE 17: OTHER ACTIVITIES – MAIN & ANY*	Cultural Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(6,760)	(6,760)	(365)	(365)
Weighted, Projected	25,179,000	25,179,000	1,322,000	1,322,000
<i>In rank order by main reason within each subgroup</i>				
Lodging (NET)	41%	62%	53%	78%
Resorts/Spas	28%	45%	35%	60%
Seaside resort	16%	27%	18%	35%
Ski/mountain resort	8%	14%	14%	28%
Wilderness/remote lodge	5%	8%	10%	17%
Food & Wine	40%	86%	48%	93%
Dining – restaurants offering local ingredients and recipes	21%	68%	25%	77%
Wineries – day tours/tastings	12%	28%	18%	37%
Local outdoor cafes	10%	43%	12%	55%
Dining – high end restaurants with international reputation	10%	27%	12%	36%
Shopping	27%	81%	30%	90%
Clothing, shoes, jewellery	16%	57%	14%	59%
Bookstores or music stores	13%	48%	16%	62%
Local arts & crafts studios	13%	49%	15%	63%
Antiques	11%	37%	16%	46%
Gourmet foods	7%	25%	9%	34%
Spectator Sports (Any)	27%	36%	28%	41%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. *Activities shown here are those that are named by at least 1-in-4 Cultural 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.

5. Overnight Cruises & Organized Group Tours

Approximately one-quarter of Cultural Tourists and two-fifths of U.S. Travellers to Alberta within this sector 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 Cultural Tourists as a whole. Among U.S. Travellers to Alberta, however, Alaska and the Caribbean are equally popular.

Of the minority of Cultural Tourists who participated in *any* overnight group tour (38%), about equal proportions claim to have taken an **organized** overnight group tour (23%) as to have taken **self-directed** touring trips over a two-year period (21%). Those who have gone on an overnight organized tour do not display a strong preference for tours to *single* versus *multiple* destinations. A very similar pattern is evident among the appreciably *higher* proportion of U.S. Travellers to Alberta who say they have participated in any overnight group tour in the past two years (64%).

Taking a day tour while on an overnight trip is more characteristic of Cultural Tourists (47%) than is taking any type of overnight tour (38%) but the reverse is the case among the U.S. Traveller to Alberta subset of this market. More of these tourists are have recently taken overnight (64%) than same-day tours (55%).

Favoured themes for organized day excursions include tours around a city and/or the countryside, sightseeing cruises, and wilderness or outdoor tours. These same themes are popular among Cultural Tourists who take *self-directed* day touring excursions.²⁸

²⁸ See Detailed Tabulations, Volume 1, Table 16-2 for figures.

TABLE 18: CRUISES/GROUP TOURS	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Took any overnight cruise in past 2 years	23%	41%	22%
Type of Cruise/Destination			
Ocean - Caribbean	12%	18%	11%
Ocean - Other	7%	16%	7%
Ocean - Alaska	4%	16%	3%
Great Lakes	1%	3%	1%
Overnight Touring (NET)	38%	64%	37%
Organized Tour	23%	41%	22%
Multiple Location	17%	35%	15%
Single Location	13%	22%	13%
Self-Directed Touring	21%	38%	21%
Same-Day Touring on Overnight Trip (NET)	47%	55%	46%
Self-Directed Touring	32%	39%	32%
Organized Excursion	30%	39%	29%
Type of Organized Day Tour			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)
City	62%	68%	62%
Countryside	48%	63%	46%
Sightseeing cruise (day excursion)	35%	52%	34%
Wilderness/outdoor	27%	45%	26%
Casino	18%	26%	17%
Wineries	17%	26%	16%
Factory	10%	22%	10%
Airplane/helicopter (pilot or passenger)	7%	19%	6%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

VI. Trip Planning

A. Who Does the Planning?

Almost all Cultural Tourists and the segment of these tourists who have been to Alberta over the past decade claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years.

In most households, the main responsibility for travel planning falls to the culture enthusiast or is shared with other household members.

TABLE 19: TRAVEL PLANNING	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Frequency of personal involvement in trip planning, past 2 years			
All	66%	72%	66%
Most	17%	12%	17%
Some	9%	12%	9%
None/not stated	8%	5%	8%
Main responsibility for trip planning			
Respondent	39%	38%	39%
Shared with other household member	27%	27%	27%
Spouse/partner	18%	22%	17%
Other/not stated/not involved in travel planning	17%	13%	17%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

B. Travel Information Sources & Travel Media

Of the many travel information sources available, relatively few enjoy widespread use among Cultural Tourists apart from the internet, personal connections and maps. The **internet** tops the chart for these tourists (75%) and those of them who have been to Alberta over the past decade (77%) (see Table 20). Over half of Cultural Tourists rely on their own **past experience** and somewhat fewer use anecdotal information provided by **friends and relatives**. About two-fifths of the cultural sector members (42%) and noticeably more U.S. Travellers to Alberta (54%) include **maps** among their sources of travel information.

Use of **official travel guides or brochures from provincial, state or national organizations** (*Official Travel Guides*) is characteristic of 1-in-3 Cultural Tourists and half of the U.S. Traveller to Alberta subset (51%). Other travel information sources that are used by close to half of the U.S. Traveller to Alberta culture market include **newspaper articles** and **automobile clubs**.

In fact, this market segment relies on a wider variety of information sources than does the Cultural Tourists sector as a whole, possibly because they are more apt to travel to more distant and exotic destinations. For example, compared to the sector as a whole, U.S. Travellers to Alberta are more likely to claim usage of **travel information received in the mail, travel agents, travel guide books, television programs**, and, at a much lower incidence, **electronic newsletters and trade or sportsmen's shows**.

Travel Information Sources for at least 1-in-3 Cultural Tourists

		U.S. Travellers to Alberta	
Total			
Internet website	75%	Internet website	77%
Past experience	56%	Past experience	67%
Friends/relatives	47%	Friends/relatives	55%
Maps	42%	Maps	54%
Official Travel Guides	34%	Official Travel Guides	51%
		Newspapers	46%
		Auto club	45%
		Mailed information	38%
		Travel agent	38%
		Travel guide books	34%

With most Cultural Tourists relying on the internet for travel planning and almost one-half saying that they *normally* visit **travel websites**, the internet offers the greatest potential for reaching this market in total and those with past experience in Alberta.

U.S. Travellers to Alberta are noticeably more apt to read the travel section in weekday and weekend editions of their local newspaper (41% each) and to normally watch **televised travel shows** (58%) than are Americans in the more broadly defined Cultural Tourist sector. Similarly, U.S. Travellers to Alberta are especially likely to be magazine readers, with at least 1-in-3 saying that in a typical month they read **news, general interest** and/or **home/garden** magazines along with **travel magazines** such as *Condé Nast* and/or **science/geography magazines** such as *National Geographic*. Their readership of each of these types of publications is noticeably higher than that evident for Cultural Tourists as a whole.²⁹

²⁹ 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

	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
<u>SOURCES OF TRAVEL PLANNING INFO</u>			
Internet website	75%	77%	75%
Past experience	56%	67%	55%
Advice of friends/relatives	47%	55%	47%
Maps	42%	54%	41%
Official travel guides	34%	51%	33%
Visitor information centres	31%	36%	31%
Any newspaper	33%	46%	32%
Articles	28%	45%	28%
Advertisements	16%	21%	16%
Auto club	31%	45%	30%
Travel information in mail	24%	38%	23%
Travel agent	23%	38%	22%
Travel guide books	20%	34%	19%
Any television	14%	23%	14%
Programs	12%	20%	12%
Advertisements	6%	6%	6%
Electronic newsletters via e-mail	8%	15%	8%
Trade, travel, sportsmen's shows	4%	9%	3%
<u>TRAVEL MEDIA</u>			
Frequently read newspaper Travel Section			
In weekday editions	24%	41%	23%
In weekend editions	28%	41%	28%
Magazines read in typical month			
Travel (<i>Condé Nast, Travel & Leisure</i>)	19%	36%	18%
Entertainment/music (<i>People, TVGuide</i>)	38%	29%	38%
Food/cooking (<i>Gourmet, Bon Appetit</i>)	27%	32%	27%
Home/garden	31%	37%	30%
General interest (<i>Harper's, New Yorker</i>)	27%	37%	27%
News (<i>Time, Newsweek</i>)	29%	42%	29%
Science/geography (<i>Nat'l Geographic</i>)	22%	33%	22%
Normally watch Travel Shows on TV	41%	58%	40%
Normally visit Travel websites	47%	57%	47%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade. More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover (see Tables 30 - 33).

C. Internet Use for Travel Inquiries & Bookings

As noted in the previous section, most Cultural Tourists rely on the internet for travel planning. Hotel/resort and travel sites such as *Expedia* or *Travelocity* are the most commonly used among the American tourists who rely on the internet for travel planning (see Table 21). Other sites used by more than 2-in-5 internet users include airline, Destination Marketing Organization (DMO) and/or attraction sites. Those in the U.S. Travellers to Alberta subset of the culture market are much more common visitors at airline and DMO sites than are Cultural Tourists in general.

Not surprisingly, *booking* online is less common than is searching for information on the internet. Nonetheless, over half of American Cultural Tourists and those who are U.S. Travellers to Alberta claim to have made a travel-related booking online over the past two years or so (54% each). 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 and attractions.

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

- Specifically, visibility on electronic sites such as *Expedia* or *Travelocity* and maintenance of Alberta's DMO websites are essential;
- Daily or weekend travel sections of local newspapers with editorial coverage of Alberta's cultural tourism options, news magazines such as *Time* or *Newsweek*, travel magazines including *Condé Nast* or *Travel & Leisure* and the official printed guides from the province or its municipalities and regions are widely used by U.S. Travellers to Alberta;
- Creating goodwill ambassadors from Cultural Tourists who come to Alberta is necessary to ensure that *advice of friends/relatives* is favourable and forthcoming. To meet this objective, Alberta has to deliver on its promises to Cultural Tourists. Based on the high overall rating by Cultural Tourists who have been to Alberta over the past decade (8.0 on a ten point scale), the province seems to be achieving this goal.
- More Cultural Tourists are apt to be reached through television travel shows or programs than through TV advertisements.

TABLE 21: WEBSITE USAGE FOR TRAVEL PLANNING	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Used Internet website for travel planning, past 2 years	75% (100%)	77% (100%)	75% (100%)
<u>Internet website(s) used</u> <i>(Among Users)</i>			
Hotel/resort	60%	67%	60%
Travel planning/booking	59%	58%	59%
Airline	49%	66%	48%
Destination marketing organization	46%	56%	46%
Attraction	45%	44%	45%
Cruise	15%	25%	15%
Motorcoach	3%	5%	2%
Other	28%	37%	28%
Any Internet Purchases in Past 2 Years <i>(Among All Overnight Pleasure Travellers)</i>	54%	54%	54%
<u>Items Purchased Online</u> <i>(Among Purchasers)</i>	(100%)	(100%)	(100%)
Accommodation	79%	81%	79%
Air tickets	72%	83%	71%
Car rental	44%	58%	43%
Tickets for activities/attractions	38%	43%	38%
Package deal (2+ items)	23%	30%	22%
Rail, bus, boat tickets	20%	30%	19%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

VII. Other Travel-Related Information

A. Use of Package Deals

Purchase of package deals in the past two years is relatively uncommon among Cultural Tourists (see Table 22). Only about 1-in-20 say they relied on a package deal for *all* or *most* of their trips over the past two years and a further 1-in-4 have used package deals for *one* or *some* of these trips. The incidence of buying packaged tours for at least one trip over the past two years is substantively higher among U.S. Travellers to Alberta (48%) than is the case within the broader culture market (34%).

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	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	6%	8%	6%
One/some trips	28%	40%	27%
No trips/not stated/not sure	66%	52%	67%
Desired Components of Packages (Among Purchasers of Packages)			
Accommodation	91%	96%	91%
Transport to destination	84%	92%	83%
Transport at destination	71%	85%	70%
Tickets for activities/attractions	69%	72%	69%
Food and beverage	53%	58%	53%
Other	24%	33%	24%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

B. Benefits Sought From Pleasure Travel

At the top of the list of benefits for taking pleasure or vacation trips among Cultural Tourists are a **break from the day-to-day environment** and the trip's ability to **relieve stress** (see Table 23).³⁰ Seven-in-ten 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**, provide the opportunity for them to **see and do different things** and/or to help **enrich familial relationships**. About half want to **abandon a fixed schedule**.

The U.S. Travellers to Alberta subset of the larger market shares many of the priorities of all Cultural Tourists, although those with experience in Alberta put more prominence **on creating memories, seeing and doing new and different things** and on expanding their **knowledge of history, other cultures and other places**.

Top *Highly Important* Benefits in Rank Order Among Cultural Tourists

Total

Break from day-to-day
Relax/relieve stress
Create lasting memories
See/do something new/different
Relationship - partner/children

U.S. Travellers to Alberta

Create lasting memories
See/do something new/different
Relationship - partner/children
Break from day-to-day
Relax/relieve stress
History, cultures, places

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

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

- Remember that many Cultural Tourists, and especially those who have been to Alberta, are world-travellers. They can or have seen historic sites, art galleries, and museums in Europe, Mexico and other countries around the globe.

³⁰ 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*.

- Thus, Alberta should focus on the elements that make its cultural experiences “special”, whether because the museum or gallery offers a unique experience in its own right or because the tourist can enjoy the cultural experience in the context of Alberta’s outdoor splendour.

TABLE 23: BENEFITS SOUGHT FROM PLEASURE TRAVEL <i>(Highly important)</i>	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
<i>% Stating “Highly Important”</i>			
<i>In rank order by Cultural Tourists</i>			
Break from day-to-day environment	70%	54%	71%
Relax/relieve stress	68%	51%	69%
Create lasting memories	64%	67%	64%
See/do something new/different	57%	67%	56%
Enrich relationship with partner/children	56%	55%	56%
No fixed schedule	50%	43%	50%
Keep family ties alive	44%	38%	45%
Knowledge of history, cultures, places	39%	49%	39%
Enrich perspectives	35%	41%	35%
Stimulate mind/intellectual challenge	30%	41%	29%
Renew personal connections (non-family)	20%	18%	20%
To be pampered	16%	13%	16%
Stories to share	16%	12%	16%
Physical challenge	15%	13%	15%
Solitude and isolation	12%	7%	13%

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 attending a cultural activity. “U.S. Travellers to Alberta” are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. “Non-Alberta Travellers” are Cultural Tourists with no trips to Alberta reported over the past decade.

C. Incidence of Summer/Winter Trips

Almost all Cultural Tourists say that they have taken an overnight pleasure trip during the summer months and at least 2-in-3 have taken winter trips (see Table 24). Winter travel is particularly characteristic of the U.S. Traveller to Alberta segment of the Culture market. Winter travel among these Cultural Tourists who have been to Alberta over the past decade might include trips taken for winter outdoor activities such as alpine skiing, but also might include cruises to the Caribbean or beach holidays in Florida.

	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Took Overnight Pleasure Trip in Past 2 Years In . . .			
Summer	86%	87%	86%
Winter	68%	80%	67%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

D. Memberships in Various Organizations

Auto club membership is characteristic of 1-in-2 Cultural Tourists and almost 2-in-3 U.S. Travellers to Alberta (Table 25). About 2-in-5 Cultural Tourists are members of a frequent flyer program while 1-in-4 belong to hotel or car rental loyalty programs. Like auto clubs, membership in these organizations is appreciably more prevalent among U.S. Travellers to Alberta than is the case among Cultural Tourists as a whole.

TABLE 25: MEMBERSHIPS	Cultural Tourists		
	Total	U.S. Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(6,760)	(365)	(6,395)
Weighted, Projected	25,179,000	1,322,000	23,858,000
Auto club	49%	64%	48%
Frequent flyer program	38%	66%	37%
Hotel/car rental loyalty program	26%	42%	26%
Sports club	18%	26%	18%
Community service club	16%	23%	16%
Book/reading club	14%	17%	14%
Hobby club	9%	11%	9%
Nature/environmental club	9%	15%	8%
Travel club	8%	15%	7%

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 attending a cultural activity. "U.S. Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Cultural Tourists with no trips to Alberta reported over the past decade.

VIII. Cultural Tourists in 2015 and 2025

Based on information provided by the U.S. Census Bureau, the size of the Cultural Tourist 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 twenty 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 Cultural Tourist sector can be assessed.

Growth in the U.S. Cultural Tourism Sector

The Cultural Tourism market is expected to increase at rates that are identical to those of the U.S. adult population as a whole. Specifically, the market will increase by nine percent between 2006 and 2015, from 25.2 million to 27.5 million; and by nineteen percent between 2006 and 2025, from 25.2 million to 30.0 million.

Growth in the U.S. Cultural Tourism Sector – U.S. Travellers to Alberta

Because Cultural Tourists have a stronger propensity than U.S. residents as a whole to travel to Alberta over a ten-year period, the growth in Cultural Tourists with some past experience in the province is significantly higher than is the case among the corresponding group within the U.S. general public (i.e., *all* Americans who have taken trips to Alberta over the previous decade). By 2015, Cultural Tourists with past experience in Alberta are expected to increase by 17%, from 1.3 million in 2006 to almost 1.6 million in 2015 and to almost 1.8 million by 2025 (35% growth from 2006).

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-quarter of the U.S. Travellers to Alberta claim to have taken a **pleasure trip** to the province over a two-year period. If this pattern holds, the “high propensity” market for cultural tourism experiences in Alberta – those who have already experienced some of the tourism goods and services Alberta offers – would be about 414,000 in 2015 and about 477,000 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%
Cultural Tourists				
Current	25,179,000		1,322,000	
2015	27,506,000	9%	1,551,000	17%
2025	30,019,000	19%	1,786,000	35%

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.

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 ³¹	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.

³¹ Formerly *Alberta Economic Development*.

B. Definition of Cultural Tourists

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

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