

THE AMERICAN MARKET FOR FAIRS AND FESTIVALS IN ALBERTA



TAMS

A SPECIAL ANALYSIS OF THE 2006 TRAVEL ACTIVITIES AND MOTIVATION SURVEY

The American Market for Fairs & Festivals 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
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I. Executive Summary

MILLIONS OF AMERICANS ARE SEARCHING FOR FAIRS AND FESTIVALS AS TOURISM EXPERIENCES.

American Fairs & Festivals Tourists – those who took overnight trips in the past two years *in order to* visit carnivals, fireworks displays, or ethnic, religious, or other festivals – represent approximately 23.9 million Americans, or about fourteen percent of the U.S. pleasure travel market. Of these Fairs & Festivals Tourists, 1.0 million (4%) claim to have been to Alberta over the past decade (*U.S. Travellers to Alberta*).

ALBERTA ATTRACTS FAIRS & FESTIVALS TOURISTS AT AN AVERAGE RATE.

Fairs & Festivals Tourists have travelled to Alberta over the past decade at about the same rate as would be expected, given their share of the total U.S. pleasure travel market. Of the 166 million Americans in the overnight pleasure travel market, three percent or 5.4 million claim to have been to Alberta over a ten-year period, and as noted above, of the 23.9 million Fairs & Festivals Tourists in the U.S.A., four percent or approximately 1.0 million have been to the province over the past decade.

FIREWORKS DISPLAYS, EXHIBITIONS, MUSIC FESTIVALS AND FOOD AND DRINK FESTIVALS ARE ESPECIALLY POPULAR.

Of the many individual activities that could have motivated a vacation among Fairs & Festivals Tourists, *fireworks displays, exhibitions or fairs, food/drink festivals* and *music festivals* are the most popular, each attracting between one-quarter and one-fifth as the main reason for a trip. *Carnivals, religious festivals* and, to a lesser extent, *ethnic festivals* are cited as the reason for a recent overnight pleasure trip by at least one-tenth of Fairs & Festivals Tourists.¹

FAIRS & FESTIVALS TOURISTS LIVE IN ALL PARTS OF THE U.S.A.

Fairs & Festivals 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 between one-sixth and one-seventh live in each of the East North Central and Pacific regions. By virtue of

¹ Specific fairs or festivals 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 size of their resident populations, **California, New York, and Texas**, followed by **Illinois, Florida, and Pennsylvania** are the largest single state contributors to the Fairs & Festivals Tourism market.

U.S. TRAVELLERS TO ALBERTA WITHIN THE FAIRS & FESTIVALS TOURIST SECTOR ARE CONCENTRATED IN THE WESTERN U.S.A.

Fairs & Festivals 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 almost 1-in-5 U.S. Travellers to Alberta within the Fairs & Festivals Tourism sector (19%).

Almost all of the urban areas identified in this report contribute to the market for Fairs & Festivals Tourists and to the subset with travel experience in the province. While no city generates more than 1-in-25 Fairs & Festivals Tourists, Los Angeles, Chicago and New York top the list for the sector as a whole. Dallas and Houston are also important urban markets among U.S. Travellers to Alberta.

MEN AND WOMEN OF ALL AGES SEEK FAIRS & FESTIVALS TOURISM EXPERIENCES, BUT THOSE ATTRACTED TO ALBERTA ARE OLDER.

Every age group is represented among Fairs & Festivals Tourists. About 1-in-10 Americans in the sector are young adults (18 to 24 years) and twice this proportion is between 25 and 34 years of age and 4-in-10 are between 35 and 54 years of age. Almost one-third are 55 years of age or older. Men and women are about equally likely to be Fairs & Festivals Tourists.

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

FAIRS & FESTIVALS TRAVELLERS TO ALBERTA ARE MORE LIKELY TO BE RETIREES, UNIVERSITY-EDUCATED AND HIGH INCOME EARNERS THAN ARE GENERIC FAIRS & FESTIVALS TOURISTS.

Fairs & Festivals Tourists closely resemble typical American tourists in terms of their education, occupational status and income. About 1-in-5 have a high school diploma or less, 2-in-5 have some post secondary education, but have not completed a university degree, and the same proportion are university graduates. Almost half claim annual household incomes under \$60,000 (US) (47%) while one-quarter say they have household incomes of \$100,000 or more per year.

U.S. Travellers to Alberta within the Fairs & Festivals Tourist sector have more formal education and higher incomes than typical Americans in this sector. About half of them have at least one university degree and almost one-third are in the \$100,000 or higher household income bracket. These tourists are twice as likely as is the average Fairs & Festivals Tourist to be retired, and possibly for this reason, are less apt to represent households with an executive, manager or professional labour force participant.

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

Not only have Fairs & Festivals Tourists been to *Canada* at a somewhat higher rate (18%) than most American pleasure travellers (13%), but they have also been to *overseas countries* at a higher rate: 31% for Fairs & Festivals Tourists compared to 26% of all U.S. overnight pleasure tourists.

Although they have been to Alberta during the past decade, about 1-in-2 U.S. Travellers to Alberta have travelled in Canada during the past **two years** (55%) versus one-fifth who have been to Mexico, Europe and/or the Caribbean in the past two years or so.

At the same time, three-fifths of Fairs & Festivals Tourists claim to travel *only* within their own country (60%). Even among Fairs & Festivals Tourists who have been to Alberta within a ten-year period, over 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 FAIRS & FESTIVALS TOURISTS.

Over a two-year period, this central Canadian province attracted about ten times as many Fairs & Festivals 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 Fairs & Festivals Tourists.

ALBERTA FACES COMPETITION FOR FAIRS & FESTIVALS TOURISTS FROM MANY U.S. STATES.

In addition to travelling outside the U.S.A., Fairs & Festivals Tourists and the U.S. Travellers to Alberta subset of this market travel widely *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 Fairs & Festivals Tourists have been to as many as fourteen (14) other states over the two-year period, few single states emerge as clear "winners".

As the exception, **Florida** attracted over 1-in-4 Fairs & Festivals 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 attend festivals or fairs or to engage in other tourism experiences. Collectively, Florida, California, and Nevada attract approximately three-fifths of Fairs & Festivals Tourists for out-of-state overnight pleasure trips. These states, along with New York, far outpace Alberta within the Fairs & Festivals Tourism market when Americans elect to travel outside their home state. Consequently, they represent substantive competition for Alberta's events, particularly in the current climate of passport uncertainty, unfavourable exchange rates and relatively high fuel prices.

A SAFE DESTINATION IS A PRIORITY.

Most Fairs & Festivals 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 or 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 offer *convenient access by car*.

The high level of importance associated with automobile access to the destination suggests that the classic American *road trip* is alive and well. Many of Fairs & Festivals Tourists' 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

For those who take long-haul trips to destinations in Canada, Europe, or Asia, *direct air access* becomes important. Three-in-ten Fairs & Festivals 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 Fairs & Festivals 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 Fairs & Festivals attractions and sites than are those wedded to driving trips.

ALBERTA FACES IMAGE BUILDING AND AWARENESS CHALLENGES IN THE AMERICAN FAIRS & FESTIVALS TOURISM MARKET.

At 5.6 on a ten-point *appeal as a destination* scale among Fairs & Festivals 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 (6.5), Ontario (6.5), Quebec (6.2), and Prince Edward Island (6.0).

Awareness-building challenges among Fairs & Festivals Tourists are clearly manifest in the finding that over one-third of Fairs & Festivals 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 Fairs & Festivals 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 7.9 on the ten-point scale. The stark contrast in impressions of the province between those with and without direct experience highlights the

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?*

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*.

FAIRS & FESTIVALS TOURISTS ARE OUTDOOR *OBSERVERS* RATHER THAN *ADVENTURERS*.

The *outdoor* activity profile of Fairs & Festivals 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 going to nature parks, sunbathing or sitting on a beach, camping and/or swimming in oceans.

Compared to Fairs & Festivals Tourists as a whole, those with experience in Alberta over the past decade are more likely to participate in the types of outdoor activities widely available within the province: going to nature parks such as Banff, Jasper or Waterton Lakes National Park, seeing well-known natural wonders such as the Canadian Badlands, viewing wildlife, camping and/or taking day hikes.

AMUSEMENT PARKS AND CASINOS ARE POPULAR TRIP ACTIVITIES.

Apart from the Fairs & Festivals activities used to define the market sector, Fairs & Festivals Tourists tend to utilize destinations' entertainment, 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, about half have gone to an historic site, amusement park and/or casino on recent pleasure trips, but only about 1-in-3 have taken a trip in order to go to an amusement park and even fewer have taken a trip motivated by visiting an historic site or casino. Similar patterns are evident for spectator sporting events, strolling around a city to observe its buildings and architecture and going to museums.

Like 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 Fairs & Festivals Tourists.

U.S. TRAVELLERS TO ALBERTA HAVE SOMEWHAT DIFFERENT INTERESTS THAN FAIRS & FESTIVALS TOURISTS AS A WHOLE.

For the most part, Fairs & Festivals Tourists who have travelled in Alberta over the past decade resemble *all* Americans in the sector in terms of the events that motivate their recent trips. There are, however, two noteworthy differences. Firstly, U.S. Travellers to Alberta are significantly more likely to take trips driven by *hot air balloon festivals* (11%) than are Fairs & Festivals Tourists as a whole (6%). Secondly, they are twice as likely to take a trip in order to attend an *international film festival* (6%) than are Fairs & Festivals Tourists in total (3%).

THE INTERNET IS “THE” TRIP PLANNING TOOL FOR FAIRS & FESTIVALS TOURISTS.

Three-quarters of Fairs & Festivals 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. Over one-third 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-quarter of Fairs & Festivals Tourists, but cited as an information source by one-half of U.S. Travellers to Alberta. In fact, Fairs & Festivals 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 maps as sources of travel information.

UNFAVOURABLE ECONOMIC CONDITIONS AND BORDER CONTROL ISSUES MAKE IT DIFFICULT TO ATTRACT U.S. FAIRS & FESTIVALS 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 Fairs & Festivals Tourists because they live in a country rich in the types of fairs and festivals most likely to motivate their trips and they display a comparative reluctance to travel *outside* the U.S.A.

LOOK TO THOSE WHO HAVE BEEN TO ALBERTA TO GUIDE STRATEGIES FOR ATTRACTING MORE U.S. FAIRS & FESTIVALS 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** and **unusual** events such as hot air balloon festivals or pow wows – those that will differentiate Alberta’s Fairs & Festivals experiences from ones tourists can readily find in the U.S.;
- Package Fairs & Festivals 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 casinos, amusement parks and spectator sporting events;
- Offer a range of **amenities** including mid-range and budget accommodation, restaurants featuring local cuisine, possibly as part of low cost organized tours or packages;
- Focus on **warm weather** months because older members of the market – those most apt to travel to Alberta – are likely to go to sun/sea destinations during the winter;
- Use the **internet, newspapers, and official travel guides or brochures** from provincial, state or national organizations to reach this market sector;
- Encourage Alberta’s tourism businesses and Destination Marketing Organizations to retain contact with *past visitors* via electronic and print messages, thereby retaining these tourists as ambassadors for Alberta among their friends and relatives.

II. Introduction

A. Background and Objectives

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

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

To support these efforts, *Alberta Tourism, Parks, Recreation and Culture* (ATPRC) selected the following 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 Experiences Tourists

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

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

B. Defining American Fairs & Festivals Tourists

This report provides information about **American Fairs & Festivals 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

- **Cultural Festivals/Events**
 - International film festivals
 - Literary festivals or events
 - Music festivals
 - Theatre festivals
- **Other Fairs/Festivals**
 - Carnivals
 - Exhibitions or fairs
 - Religious festivals
 - Food/drink festivals
 - Ethnic festivals
 - Gay Pride parades
 - Firework displays
 - Hot air balloon festivals
 - Comedy festivals
 - Aboriginal festivals and events (e.g., pow wows)

The TAMS questionnaire provided no further guidance about themes or activities than the words and phrases displayed above. Hence, survey respondents brought their own interpretation to the listed items. While some are self-explanatory and/or have a widely shared meaning (e.g., *international film festival*, *carnivals*, *comedy festivals*), others such as *exhibitions or fairs* or *religious festivals* could encompass a wide variety of themes and activities.

The primary focus of this report is on Fairs & Festivals Tourists as a group, but where there are noteworthy differences between them, commentary is provided on *U.S.*

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.

Travellers to Alberta — the subset of Fairs & Festivals Tourists who claim to have visited Alberta for any purpose over the past decade.⁵

People who take a trip *in order to* go to a fair or festival are only a fraction of tourists who attend these types of events while on their vacations. In fact, approximately 62.6 million Americans say they have gone to fairs or festivals on at least one of their trips over a two-year period.

Of these American pleasure tourists, almost two-fifths or about 23.9 million (38%) say they took a trip *in order to* go to a fireworks display, ethnic, religious or other festival or fair. These enthusiasts – those for whom a fair or festival 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.

Note to Readers

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

In other words, American Fairs & Festivals Tourists claim to have taken an overnight trip motivated by a festival or fair 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, Fairs & Festivals Tourists may or may not have been attending a fair or festival in a particular country, province or state they have visited recently for an overnight pleasure trip.

⁵ See comments on telescoping for a two-year recall period in footnote 4. Since the potential for imprecision increases as the recall period increases, readers are advised to interpret the “past ten years” liberally.

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

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

Three percent of the American overnight pleasure travel market, or about 5.4 million tourists, have had *some* experience with Alberta destinations over the past decade. They may have been on a vacation, visiting friends and relatives or on a business trip to the province. Of these U.S. Travellers to Alberta over the past ten years, close to half claim to have visited Alberta in the past two years or so (2.0 million). Most of these recent visitors to the province were on a pleasure or vacation trip (1.5 million).

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

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

III. Market Profile: American Fairs & Festivals Tourists

A. Market Segments

The Fairs & Festivals 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.

- **Cultural Festivals/Events**
 - International film festivals
 - Literary festivals or events
 - Music festivals
 - Theatre festivals
- **Other Fairs/Festivals**
 - Carnivals
 - Exhibitions or fairs
 - Religious festivals
 - Food/drink festivals
 - Ethnic festivals
 - Gay Pride parades
 - Firework displays
 - Hot air balloon festivals
 - Comedy festivals
 - Aboriginal festivals and events (e.g., pow wows)

These overnight pleasure tourists represent approximately one-eighth of *all* American adults (11%) and almost one-seventh of the U.S. overnight pleasure travel market, or 23.9 million people (14%). Compared to the travelling public as a whole (14%), Fairs & Festivals Tourists are somewhat more prevalent among Americans who have been to Alberta over the past decade (19%).⁶

“Cultural” Fairs & Festivals – Just over one-quarter of Fairs & Festivals Tourists have taken an overnight trip to enjoy one or more of the four traditional “cultural festivals” included in the study (*international film, literary, music and/or theatre festivals*) (see Table 2).

Other Fairs & Festivals – Almost all Fairs & Festivals Tourists have taken an overnight trip to enjoy one or more of a wide array of other festivals and events (86%). Among the most popular are fireworks displays, exhibitions or fairs and food/drink festivals, followed by religious festivals and carnivals.

⁶ See Detailed Tables, Volume 1, Table 3-1 for figures.

Individual Activities

Of the many individual activities that could have motivated a holiday among Fairs & Festivals Tourists, *fireworks displays* and *exhibitions or fairs* are the most popular. These events are each identified as the main reason for a trip by about one-quarter of the market sector. *Music* (21%) and *food/drink festivals* (20%) are each cited as the reason for a recent overnight pleasure trip by one-fifth of U.S. Fairs & Festivals Tourists. Slightly fewer indicate that *religious festivals* (17%) and/or *carnivals* (16%) were trip drivers.

Approximately 1-in-10 Fairs & Festivals Tourists took a trip in order to go to an *ethnic festival* (11%). *Aboriginal festivals, hot air balloon festivals, gay pride parades* and *comedy festivals* drew less than one-tenth of the market as the main reason for a recent overnight pleasure trip.

As noted above, of the traditional “cultural festivals” covered in the study, *music festivals* are the most popular (21%). In contrast, trips driven by *international film, literary* or *theatre festivals* are each characteristic of less than one-twentieth of this market.

U.S. Travellers to Alberta

For the most part, Fairs & Festivals Tourists who have travelled in Alberta over the past decade resemble *all* Americans in the sector in terms of the events that motivate their recent trips. There are, however, two noteworthy differences:

1. U.S. Travellers to Alberta are **significantly more likely to take trips driven by *hot air balloon festivals*** (11%) than are Fairs & Festivals Tourists as a whole (6%); and
2. They are **twice as likely to take a trip in order to attend an *international film festival*** (6%) than are Fairs & Festivals Tourists in total (3%).

TABLE 2: FAIRS & FESTIVALS AS MAIN REASONS FOR OVERNIGHT TRIPS	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Traditional "Cultural" Festivals/Events	27%	26%	27%
Music festivals	21%	19%	21%
Theatre festivals	4%	6%	4%
International film festivals	3%	6%	3%
Literary festivals or events	2%	3%	2%
Other Fairs/Festivals	86%	86%	86%
Firework displays	24%	21%	24%
Exhibitions or fairs	23%	25%	23%
Food/drink festivals	20%	17%	20%
Religious festivals	17%	15%	17%
Carnivals	16%	16%	16%
Ethnic festivals	11%	13%	11%
Aboriginal festivals and events (e.g., pow wows)	7%	11%	7%
Hot air balloon festivals	6%	11%	6%
Gay Pride parades	4%	3%	5%
Comedy festivals	2%	3%	2%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals Tourists with no trips to Alberta reported over the past decade.

B. Regional and Demographic Characteristics

1. Place of Residence

Fairs & Festivals 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.

Fairs & Festivals 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 between one-sixth and one-seventh live in each of the East North Central and Pacific regions.

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

U.S. Travellers to Alberta within the sector differ from Fairs & Festivals Tourists 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 Fairs & Festivals Tourists with travel experience in Alberta are comparatively unlikely to live in Mid Atlantic states including New York, Pennsylvania and New Jersey; and in East North Central states such as Illinois. In contrast, these U.S. Travellers to Alberta are particularly likely to be residents of western states.

The **Pacific** states are home to about 1-in-6 adult Americans (16%) and the same proportion of Fairs & Festivals Tourists (17%) but U.S. Travellers to Alberta in the Fairs & Festivals segment live in California, Oregon or Washington at twice this rate (32%, 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 Fairs & Festivals Tourism sector (19%).

Each of the urban areas noted in Table 3 contributes to the market for Fairs & Festivals Tourists and to the subset with travel experiences in the province. While no city generates more than 1-in-25 Fairs & Festivals Tourists, Los Angeles, Chicago, New York, and Detroit top the list for the sector as a whole. Los Angeles is the single biggest urban source of U.S. Travellers to Alberta in the sector (6%), followed at a considerable distance by Dallas and Houston (3%, each).

TABLE 3: PLACE OF RESIDENCE	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
New England	5%	2%	5%
Massachusetts	2%	*	2%
Connecticut	1%	1%	1%
Hartford	*	*	*
New Haven MSA	1%	*	1%
Middle Atlantic	13%	5%	14%
New York State	7%	3%	7%
New York City	3%	1%	4%
Pennsylvania	4%	1%	4%
New Jersey	3%	1%	3%
Newark	1%	*	1%
East North Central	16%	11%	16%
Illinois	5%	2%	5%
Chicago	3%	1%	4%
Michigan	3%	2%	4%
Detroit	2%	1%	2%
Ohio	3%	2%	3%
West North Central	8%	7%	8%
Minnesota	2%	4%	2%
Missouri	2%	*	2%
South Atlantic	18%	16%	19%
Florida	5%	4%	5%
Georgia	3%	3%	3%
North Carolina	3%	3%	3%
Virginia	3%	2%	3%
East South Central	6%	3%	6%
West South Central	10%	14%	10%
Texas	7%	10%	7%
Dallas	1%	3%	1%
Houston	1%	3%	1%
Mountain	7%	10%	7%
Colorado	2%	4%	2%
Arizona	2%	3%	2%
Nevada	1%	*	1%
New Mexico	1%	1%	1%
Pacific	17%	32%	16%
California	13%	19%	13%
Los Angeles	4%	6%	4%
San Francisco	1%	2%	1%
Sacramento	1%	1%	1%
San Diego	1%	2%	1%
San Jose	*	*	1%
Washington	2%	8%	2%
Oregon	2%	5%	1%

Source: TAMS U.S. Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 44. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of attending a fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals 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 Fairs & Festivals Tourists. About 1-in-10 Americans in the sector are young adults (18 to 24 years), twice this proportion is between 25 and 34 years of age (20%) and 4-in-10 are between 35 and 54 years of age (see Table 4). Almost one-third are 55 years of age or older. Men and women are about equally likely to be Fairs & Festivals Tourists.

Fairs & Festivals 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 (51%), compared to less than one-third of Fairs & Festivals Tourists in total (30%).

TABLE 4: AGE & GENDER	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Age			
18 – 24 Years	11%	5%	11%
25 – 34 Years	20%	11%	21%
35 – 44 Years	17%	12%	17%
45 – 54 Years	22%	21%	22%
55 – 64 Years	17%	20%	17%
65+ Years	13%	31%	12%
Gender			
Men	51%	56%	51%
18 – 34 Years	16%	10%	16%
35 – 54 Years	20%	19%	20%
55+ Years	16%	28%	15%
Women	49%	44%	49%
18 – 34 Years	15%	7%	16%
35 – 54 Years	19%	15%	19%
55+ Years	14%	23%	14%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals Tourists with no trips to Alberta reported over the past decade.

Race, Education, Occupation, and Income

Almost all American Fairs & Festivals Tourists, like tourists who live in the U.S.A. as a whole, are Caucasian (see Table 5). They also closely resemble typical American tourists in terms of their education, occupational status and income.

- About 1-in-5 have a high school diploma or less, 2-in-5 have some post secondary education but have not completed a university degree, and the same proportion are university graduates;
- Half claim annual household incomes under \$60,000 (US) (47%), a further 3-in-10 are in the \$60,000 to under \$100,000 income bracket (29%) and one-quarter say they have household incomes of \$100,000 or more per year (24%); and
- Three-in-ten live in households with at least one person occupying an executive, managerial or professional position (30%) whereas half this proportion indicate that they have retired from the labour force (14%).

U.S. Travellers to Alberta within the Fairs & Festivals Tourist sector have more formal education and higher incomes than typical Americans in this sector. About half of them have at least one university degree (52%) and almost one-third are in the \$100,000 or higher household income bracket. They are twice as likely to be retired as the average Fairs & Festivals Tourist, and possibly for this reason, are less apt to represent households with an executive, manager or professional labour force participant.

TABLE 5: RACE, EDUCATION, OCCUPATION, INCOME	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Race			
Caucasian	81%	83%	81%
African American	8%	3%	9%
Asian American	3%	5%	3%
Other/Not stated	8%	9%	8%
Education			
High school diploma or less	18%	11%	18%
Some post-secondary	29%	26%	29%
Post-secondary diploma or certificate	12%	8%	12%
University degree+	40%	52%	39%
Labour Force Participant¹			
Retirees	14%	31%	14%
Executive/Manager /Professional ²	30%	25%	30%
Household Income			
Under \$40,000	27%	17%	28%
\$40,000 - \$59,999	20%	18%	20%
\$60,000 - \$99,999	29%	35%	29%
\$100,000 - \$149,999	16%	17%	16%
\$100,000+	24%	30%	23%
\$150,000+	8%	13%	7%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals Tourists with no trips to Alberta reported over the past decade.¹ "Labour force participant" includes working full-time, part-time and self-employed. ²Male or female head of household.

3. Lifestage

Since lifestage is closely linked to an individual's age, it is not surprising that with almost three-fifths of Fairs & Festivals 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: about half of these tourists are in the 55 or over age cohort and, correspondingly, over two-fifths them are living as *couples*, divided almost evenly between *retired older couples* (17%) and *working older couples* (18%).

On average, Fairs & Festivals Tourists live in households of three people (3.0). 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 (2.7).

TABLE 6: HOUSEHOLD CHARACTERISTICS	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
HOUSEHOLD SIZE			
1 person	14%	16%	13%
2 people	34%	43%	34%
3 person	18%	14%	19%
4 people	18%	14%	18%
5+ people	16%	13%	16%
Average (all ages)	3.0	2.7	3.0
LIFESTAGE¹			
Young singles	4%	2%	4%
Middle singles	7%	8%	7%
Older singles	3%	5%	3%
Young couple	11%	8%	11%
Working older couple	13%	18%	13%
Retired older couple	9%	17%	8%
Young parent	10%	4%	10%
Middle parent	11%	5%	11%
Older parent	28%	28%	29%
Any singles	14%	16%	13%
Any couples	33%	43%	33%
Any parent	49%	37%	50%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals 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 Fairs & Festivals Tourists indicated that they have taken recent vacations within the U.S.A. and three-fifths claim to have travelled *only* within their own country (60%) (see Table 7). Even among Fairs & Festivals Tourists who have been to Alberta within a ten-year period, more than one-quarter have confined their *recent* overnight pleasure trips to locations within the U.S.A. (27%).

Almost one-fifth of American Fairs & Festivals Tourists have been to Canada on a recent overnight pleasure trip (18%). 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 event enthusiasts.⁷

Not only have Fairs & Festivals Tourists been to *Canada* at a higher rate than most American pleasure travellers, but they have also been to *other countries* at a somewhat higher rate: 31% for Fairs & Festivals Tourists compared to 26% of all U.S. overnight pleasure tourists.

Willingness to 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 about 1-in-5 have been to each of Mexico, Europe and/or the Caribbean in the past two years or so.

Note to Readers

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

In other words, American Fairs & Festivals Tourists claim to have taken an overnight trip motivated by events 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, Fairs & Festivals Tourists may or may not have been to a fireworks display or carnival in a particular country, province or state they have visited recently for an overnight pleasure trip.

⁷ See Detailed Tabulations, Volume 1, Table 49 for all U.S. overnight pleasure traveller figures.

TABLE 7: COMPETITIVE DESTINATIONS WORLDWIDE*	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Canada	18%	55%	16%
U.S.A.	99%	99%	99%
Other Countries (NET)	31%	50%	30%
Mexico	15%	23%	14%
Caribbean	13%	21%	12%
Europe	10%	21%	10%
South/Central America	4%	12%	4%
Asia	3%	9%	3%
Africa	1%	3%	1%
Australia/New Zealand	1%	5%	1%
Destination patterns			
Only U.S.A.	60%	27%	61%
U.S.A. & Canada only	9%	23%	9%
U.S.A. & Mexico only	5%	3%	6%
U.S.A. & Canada & Other Countries	9%	33%	8%
U.S.A. & Other Countries only (not Canada or Mexico)	11%	12%	11%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals Tourists with no trips to Alberta reported over the past decade.

B. Canadian Destinations

Approximately 1-in-25 Fairs & Festivals Tourists have had some travel experience in Alberta over a ten-year period (4%), but only one-quarter of this proportion (1%) 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 (1%). These recent U.S. Travellers to Alberta may or may not have attended a festival or fair in Alberta or any other specific destination they claim to have visited recently.

Ontario is the principle Canadian competitor for Fairs & Festivals Tourists. Over a two-year period, this central Canadian province attracted about ten times as many Fairs & Festivals Tourists (11%) as did Alberta (1%). 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.⁸

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 the same time, British Columbia is as popular as Alberta as a recent destination among Fairs & Festivals Tourists (30%) and is followed closely by Ontario (25%) (for additional information on the relative appeal of Alberta and British Columbia among residents of Pacific states, please see the following page).

⁸ 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 fairs and festivals clearly suggest that:

- Alberta is more successful at attracting generic visitors from the Pacific Region (26%), and most particularly California (17%) and Washington (6%) than would be expected based on the size of the traveller populations in these areas;
- The province has been somewhat more successful in attracting Fairs & Festivals Tourists from the Pacific region (32%) than it has been in drawing *generic* tourists from this region (26%); and
- British Columbia is appreciably more successful than is Alberta in capturing generic market share from the Pacific Region (50%) and most particularly from California (24%) and neighbouring Washington State (20%).

PLACE OF RESIDENCE	All U.S. Pleasure Travellers to . . .			U.S. Fairs & Festivals Tourists to Alberta (past 10 years)
	Any Destination (past 2 years)	British Columbia (past 2 years) ⁹	Alberta (past 10 years)	
Pacific Region	16%	50%	26%	32%
California	13%	24%	17%	19%
Washington	2%	20%	6%	8%
Oregon	1%	Not Available	3%	5%

⁹ 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*	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Alberta			
Any purpose, past 10 years	4%	100%	-
Any purpose, past 2 years	2%	42%	-
Pleasure, past 2 years	1%	32%	-
Overnight Pleasure Trips in Past 2 Years to . . .			
Atlantic Canada	2%	14%	2%
Quebec	5%	12%	4%
Ontario	11%	25%	10%
Man/Sask	1%	13%	1%
British Columbia	5%	30%	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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals 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 Fairs & Festivals Tourists elect to visit for overnight pleasure trips. Thus, Table 9 displays destinations in states other than the one in which a Fairs & Festivals Tourist lives. Limited information on state destinations of these travellers including the one in which they live is available on the following page.¹⁰

Fairs & Festivals Tourists and the U.S. Travellers to Alberta subset of this market are widely travelled *within* the U.S.A. At least one-tenth of them have taken overnight pleasure trips to as many as fourteen (14) *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 Fairs & Festivals Tourists.

As the exception, **Florida** attracted over 1-in-4 Fairs & Festivals 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 attend festivals and events or to engage in other tourism experiences such as Disney World. Collectively, these destinations, including Florida, California, and Nevada attract three-fifths of Fairs & Festivals Tourists for out-of-state overnight pleasure trips (59%).

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

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

When residents are included, California captures over one-quarter of the entire American Fairs & Festivals Tourist market and more than two-fifths of those who have taken trips to Alberta over the past decade (on trips that may or may not have included attending a fair or festival). Based on these findings, it seems clear that Alberta is

¹⁰ For the full list of states visited, see Detailed Tabulations, Volume 1, Table 49.

competing with California as a destination both for California *residents* and for those who *live in other U.S. states*.

<u>Destinations</u>	Fairs & Festivals Tourists			
	<u>Excluding State Residents</u>	<u>Including State Residents</u> ¹¹		
	Total	U.S. Travellers to Alberta	Total	U.S. Travellers to Alberta
Florida	27%	32%	30%	35%
Nevada	18%	24%	18%	24%
California	16%	31%	27%	44%
New York	16%	25%	20%	27%
Washington, D.C.	12%	18%	12%	18%
Georgia	12%	16%	15%	18%
Illinois	12%	16%	14%	18%
Pennsylvania	12%	16%	15%	17%
Tennessee	12%	14%	14%	15%
Arizona	11%	24%	12%	26%
Colorado	10%	27%	11%	30%
Texas	10%	19%	15%	26%

¹¹ See Detailed Tabulations, Volume 1, Table 49.

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

	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Sun/Sea States (S)	59%	72%	58%
<i>In rank order by Fairs & Festivals Tourists</i>			
Florida (S)	27%	32%	26%
Nevada (S)	18%	24%	17%
California (S)	16%	31%	16%
New York	16%	25%	16%
Georgia	12%	16%	12%
Illinois	12%	16%	12%
Pennsylvania	12%	16%	12%
Tennessee	12%	14%	12%
Washington, D.C.	12%	18%	12%
Arizona (S)	11%	24%	10%
Colorado	10%	27%	9%
North Carolina	10%	15%	10%
Texas (S)	10%	19%	9%
Virginia	10%	14%	10%

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 Fairs & Festivals Tourists. "Total" includes all Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of attending a fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals Tourists with no trips to Alberta reported over the past decade.

D. Destinations: Roles & Ratings

1. Importance of Destination

For three-fifths of U.S. Fairs & Festivals 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 (22%), or slightly less commonly, with the **activities** they want to enjoy while on their trip (18%).

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

TABLE 10: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
First Consideration for Most Recent Summer/Winter Trip (NET)*			
Start with destination	62%	60%	62%
Start with type of vacation experience	22%	23%	22%
Start with activities	18%	21%	18%
Look for package deal	3%	3%	3%
Importance of Destination			
Extremely/Very Important (SUM)	69%	73%	69%
Extremely important	32%	35%	32%
Very important	38%	39%	38%
Average**	4.0	4.0	3.9

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals 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.¹²

On balance, Fairs & Festivals 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* (53%) and/or want *convenient access by car* to their destination (54%). This level of interest in automobile access suggests 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.¹³

More than two-fifths also place high importance on a destination that poses *no health concerns* (45%) and one-third seek destinations offering *mid-range lodging, low cost packages* and/or *budget lodging*. Availability of *information on the internet* is very important to almost 1-in-3 Fairs & Festivals Tourists when making their destination choices.

Note that the importance accorded varying grades of lodging, from campsites and budget lodging through luxury accommodation, reflects the diversity of the U.S. Fairs & Festivals market. While some of these tourists have higher-than-average education and income levels, there are less educated and less affluent travellers among them. For example, over 1-in-4 Fairs & Festivals Tourists have annual household incomes under \$40,000. **These relatively low income Americans tend not to be those who have travelled to Alberta.**

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

¹³ The question wording suggests that variables related to transportation are associated with getting to the destination: *How important are each of the following conditions when choosing a destination for an out-of-town pleasure or vacation trip of one or more nights?*

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

	Fairs & Festivals Tourists		<u>All U.S. Pleasure Tourists</u>
	Total	U.S. Travellers to Alberta	
Feeling safe	73%	65%	73%
Convenient access by car (to destination)	54%	48%	51%
Lots for adults to see/do	53%	53%	48%
No health concerns	45%	37%	43%
Low cost packages	34%	28%	32%
Mid-range accommodation	34%	36%	33%
Budget accommodation	33%	26%	29%

U.S. Travellers to Alberta resemble Fairs & Festivals Tourists as a whole in terms of the conditions they deem highly important in their destination choices. They are, however, somewhat less focussed on health and safety considerations, budget lodging, availability of low cost packages or information on the internet than are Fairs & Festivals Tourists in total. **Because they tend to be older than the sector as a whole, U.S. Travellers to Alberta are also relatively unconcerned about whether a destination offers activities for children and, possibly because they are more adventuresome, about being familiar with the language and culture of their destinations.**

TABLE 11: CONDITIONS FOR SELECTING A DESTINATION

	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
<i>Bold rows are proportion stating "Highly Important". In rank order by Fairs & Festivals Tourists</i>			
Feeling safe	73%	65%	73%
Of no importance	3%	5%	3%
Convenient access by car (to destination)	54%	48%	54%
Of no importance	7%	7%	7%
Lots for adults to see/do	53%	53%	53%
Of no importance	4%	4%	4%
No health concerns	45%	37%	45%
Of no importance	14%	16%	14%
Mid-range accommodation	34%	36%	34%
Of no importance	11%	12%	11%
Low cost packages available	34%	28%	35%
Of no importance	17%	28%	17%
Budget accommodation	33%	26%	33%
Of no importance	19%	23%	18%
Information available on internet	30%	22%	30%
Of no importance	22%	27%	22%
Direct access by air (to destination)	29%	35%	28%
Of no importance	25%	19%	25%
Familiar with culture & language	22%	13%	22%
Of no importance	17%	24%	17%
Lots for children to see/do	20%	10%	20%
Of no importance	57%	69%	56%
Great shopping	19%	16%	19%
Of no importance	33%	42%	32%
Have friends or relatives there	13%	10%	13%
Of no importance	55%	61%	55%
Luxury accommodation	12%	11%	12%
Of no importance	51%	54%	51%
Very different culture than own	11%	12%	11%
Of no importance	40%	34%	41%
Convenient access by train/bus (to destination)	11%	12%	11%
Of no importance	47%	42%	47%
Disabled-person-friendly	11%	10%	11%
Of no importance	66%	69%	66%
Camping	11%	14%	11%
Of no importance	58%	54%	58%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals Tourists with no trips to Alberta reported over the past decade.

3. Appeal of Various Destinations

American Fairs & Festivals 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).¹⁴ Though significantly lower than Hawaii's, moderately favourable ratings are accorded a host of destinations, including California (7.5), Florida (7.4), and Colorado (7.2). **At 5.6 among Fairs & Festivals Tourists, Alberta is rated significantly below these states and New York State, Arizona, neighbouring British Columbia, Ontario and Quebec.** Furthermore, over one-third of U.S. Fairs & Festivals 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 Fairs & Festivals Tourists/U.S. Travellers to Alberta

	Fairs & Festivals Tourists		All U.S.
	Total	U.S. Travellers to Alberta	<u>Pleasure Tourists</u>
Hawaii	8.4	8.3	8.4
California	7.5	7.3	7.3
Florida	7.4	7.0	7.3
Colorado	7.2	7.8	7.1
New York State	6.8	7.1	6.6
Arizona	6.7	7.0	6.6
Ontario	6.5	7.3	6.1
British Columbia	6.5	8.7	6.2
Quebec	6.2	7.1	5.8
Prince Edward Island	6.0	7.4	5.6
Nova Scotia	5.8	7.4	5.5
Alberta	5.6	7.9	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 7.9, positioning it behind Hawaii and British Columbia, on par with Colorado and ahead of virtually every other Canadian destination. The challenge, of course, is in getting more of these event enthusiasts to the province!

¹⁴ Two image questions associated with specific destinations were included in the TAMS study. One of these asked travellers to use a ten-point bi-polar rating scale ranging from *very appealing* (10) to *very unappealing* (1) to assess each destination's appeal for a pleasure trip. The second question associated with reasons to travel to a destination is discussed in the following chapter. 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.

TABLE 12: APPEAL OF VARIOUS DESTINATIONS

DESTINATIONS	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
<i>Bold rows are average ratings*</i>			
Alberta	5.6	7.9	5.4
No rating provided	36%	9%	37%
Newfoundland & Labrador	5.1	6.8	5.0
No rating provided	39%	29%	40%
Nova Scotia	5.8	7.4	5.7
No rating provided	33%	22%	33%
New Brunswick	5.2	6.8	5.1
No rating provided	40%	27%	41%
Prince Edward Island	6.0	7.4	5.9
No rating provided	34%	28%	35%
Quebec	6.2	7.1	6.1
No rating provided	24%	14%	25%
Ontario	6.5	7.3	6.4
No rating provided	22%	16%	22%
Manitoba	5.0	6.3	4.9
No rating provided	40%	27%	41%
Saskatchewan	5.0	6.4	5.0
No rating provided	39%	27%	40%
British Columbia	6.5	8.7	6.4
No rating provided	28%	15%	28%
Yukon	5.4	6.9	5.3
No rating provided	34%	23%	34%
Northwest Territories	5.5	6.8	5.4
No rating provided	33%	30%	33%
New York State	6.8	7.1	6.8
No rating provided	10%	9%	10%
Colorado	7.2	7.8	7.1
No rating provided	11%	8%	11%
Florida	7.4	7.0	7.4
No rating provided	5%	5%	5%
California	7.5	7.3	7.5
No rating provided	7%	3%	7%
Hawaii	8.4	8.3	8.4
No rating provided	8%	6%	8%
Arizona	6.7	7.0	6.7
No rating provided	10%	5%	10%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals 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 Fairs & Festivals Tourists' lists for having *many good reasons* to visit on a pleasure trip (see Table 13).¹⁵ Specifically, Hawaii tops the list with 7-in-10 stating that there are many good reasons to go to this tropical destination.

Alberta is well down in the sequence, with only one-eighth of Fairs & Festivals Tourists (12%) claiming that there are *many* good reasons to go to this province. Hawaii, California, Florida, New York State and Colorado far surpass Alberta as a destination with many reasons to visit according to these event sector members. The ranking of destinations with *many good reasons to visit* is essentially the same for members of the Fairs & Festivals Tourism sector as it is for the U.S. pleasure market as a whole.

In contrast, those Fairs & Festivals Tourists who are U.S. Travellers to Alberta are significantly more likely to position Alberta as a destination with many good reasons to visit. About half describe the province in this manner (49%), putting it almost on par with Colorado and California, but significantly below Hawaii and neighbouring British Columbia. 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)¹⁶

Fairs & Festivals Tourists				All U.S. Pleasure Tourists	
	Total	U.S. Travellers to Alberta			
Hawaii	70%	Hawaii	63%	Hawaii	67%
California	57%	British Columbia	61%	Florida	54%
Florida	57%	California	54%	California	53%
		Colorado	53%		
Alberta	12%	Alberta	49%	Alberta	10%

¹⁵ Consumers were asked to indicate which of three statements best described their feelings about taking a pleasure trip to the same destinations for which they rated *appeal* (see previous section). The statements were *there are NO good reasons to travel to this destination*, *SOME good reasons . . .* and *MANY good reasons to travel to this destination*.

¹⁶ See Table 13 for the full array of ratings.

TABLE 13: NUMBER OF REASONS TO VISIT
VARIOUS DESTINATIONS

	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
<i>% stating "MANY" good reasons to visit</i>			
Alberta	12%	49%	11%
<i>Rank order among Fairs & Festivals Tourists</i>			
Hawaii	70%	63%	71%
California	57%	54%	57%
Florida	57%	49%	57%
New York State	45%	43%	45%
Colorado	44%	53%	43%
Arizona	33%	33%	33%
British Columbia	26%	61%	25%
Ontario	26%	33%	25%
Quebec	24%	35%	23%
Nova Scotia	16%	32%	15%
Prince Edward Island	15%	34%	15%
Northwest Territories	15%	30%	14%
Yukon	14%	36%	13%
Newfoundland & Labrador	10%	22%	10%
New Brunswick	9%	23%	9%
Saskatchewan	8%	16%	8%
Manitoba	7%	14%	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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals 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*.¹⁷

As noted previously, American Fairs & Festivals Tourists claim to have taken an overnight trip motivated by one or more fairs or festivals in the past two years and to have taken overnight pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Nonetheless, it is reasonable to assume that some of the film festivals, carnivals, fireworks displays or food and drink festivals that have motivated trips among those who have been to Alberta over the past decade were events that took place within the province.

“Main Reason” and “Any Participation”

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

¹⁷ Presumably, “these trips” are those on which the specific activity took place.

B. Trip Activities & Drivers

1. Major Trip Activity Groups

Like most tourists, Fairs & Festivals Tourists take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors (see Table 14).¹⁸

- In addition to taking trips in order to go to fairs and festivals, 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. Just under half are motivated to take trips by at least one **water-based outdoor activity** such as fishing or paddling.
- Two-fifths have taken recent overnight pleasure trips in order to engage in **entertainment** activities such as theme parks, casinos and movies; to stay in a resort, campground or lodge (**lodging**); and/or to enjoy **dining and wine-related** experiences.
- Almost one-third of Fairs & Festivals Tourists say they have taken holidays to go to **spectator sporting events** such as professional baseball or football games and about one-quarter have been motivated to travel in order to see **historic sites/buildings** and/or to **shop**.
- **Museums** and/or **cultural performances** attract about one-fifth of Fairs & Festivals Tourists as trip motivators.

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

- **land-based outdoor activities** such as hiking, bird watching or viewing land-based animals as trip drivers increase from about half of all Fairs & Festivals Tourists to almost three-quarters of U.S. Travellers to Alberta;
- cultural and history-oriented activities such as going to **historic sites** or buildings, visiting **museums** and **art galleries**, attending cultural **performances** and going to **Aboriginal cultural attractions** or events are significantly more likely to motivate

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

Fairs & Festivals Tourists who have been to Alberta than they are to drive trips among sector members as a whole;

- **culinary** interests are somewhat more salient trip motivators for Fairs & Festivals Tourists with experience in Alberta (51%) than they are within the segment overall (42%);
- similarly, **winter outdoor activities** including alpine skiing and snowmobiling are more common trip drivers for U.S. Travellers to Alberta (24%) than they are among all U.S. Fairs & Festivals Tourists (15%).

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 Fairs & Festivals Tourists as a whole and those who have been to Alberta over the past decade.

For example, more Fairs & Festivals 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 (52%). The most dramatic shifts, however, are associated with dining and shopping. Food and wine experiences are, in effect, “one-of-many” trip activities for almost all Fairs & Festivals Tourists (84%), but the driving force behind a trip for half this proportion (42%). Similarly, 3-in-4 Fairs & Festivals 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, Fairs & Festivals Tourists and especially those who have been to Alberta over the past ten years are much more likely to identify activities in most major activity groups as ones that *motivated* recent trips (main reason). Some examples are displayed in the following table.¹⁹

Major Activity Group	<u>Main Reason</u>			<u>Any Participation</u>		
	<u>Fairs & Festivals Tourists</u>		All U.S. Pleasure Tourists	<u>Fairs & Festivals Tourists</u>		All U.S. Pleasure Tourists
	<u>U.S. Travellers to Alberta</u>			<u>U.S. Travellers</u>		
	Total	to Alberta	Total	Total	to Alberta	Total
Outdoor Land-Based	52%	72%	30%	75%	88%	63%
Theme/Amusement Parks	43%	41%	22%	60%	63%	43%
Food/Wine	42%	51%	13%	84%	90%	74%
Art Galleries	10%	18%	3%	25%	42%	15%

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

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

- Fairs & Festivals Tourists and especially those who have demonstrated a willingness to travel to Alberta are *multi-dimensional* tourists.
- They may place particular emphasis on *fairs and festivals* for some of their trips, but many also take trips in order to have low-energy encounters with the outdoors, go to theme parks or casinos, stay at resorts or lodges, enjoy local and internationally acclaimed cuisine or wine tasting or attend spectator sporting events. Packaging and marketing fair and festival 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 Fairs & Festivals Tourists may require assurances that they will have opportunities to shop and have fine dining experiences while on an event-focused trip.
- Upscale and older Fairs & Festivals 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 *land-* and *water-*oriented outdoor products and/or Aboriginal experiences with other festival activities might have special appeal to niche groups within the U.S. Fairs & Festivals Tourist market.

TABLE 14: MAJOR ACTIVITY GROUPS
- MAIN & ANY

	Fairs & Festivals Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(6,410)	(6,410)	(298)	(298)
Weighted, Projected	23,946,000	23,946,000	1,030,000	1,030,000
Outdoor Land Based Activities	52%	75%	72%	88%
Outdoor Water Based Activities	47%	65%	47%	66%
Theme/Amusement Parks/Movies (Entertainment)	43%	60%	41%	63%
Lodging (Lodges, Resorts, etc.)	42%	63%	50%	77%
Food & Wine	42%	84%	51%	90%
Spectator Sports	30%	40%	33%	47%
Historic Sites/Buildings	26%	50%	36%	63%
Shopping	24%	78%	27%	86%
Museums	20%	43%	33%	62%
Performing Arts	20%	33%	29%	49%
Outdoor Winter Activities	15%	19%	24%	30%
Aboriginal Culture/Events	12%	18%	20%	32%
Art Galleries	10%	25%	18%	42%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination.

2. Individual Trip Activities: The Outdoors

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

Compared to the sector as a whole, U.S. travellers who have visited Alberta in the past decade are more likely to participate in the types of outdoor activities widely available within the province - going to nature parks such as Banff, Jasper or Waterton Lakes National Park, seeing well-known natural wonders such as the Canadian Badlands, viewing wildlife, camping and/or taking day hikes. In other respects, however, American Fairs & Festivals Tourists with Alberta experience resemble all Fairs & Festivals Tourists in their choices of outdoor activities.

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

TABLE 15: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY*

	Fairs & Festivals Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(6,410)	(6,410)	(298)	(298)
Weighted, Projected	23,946,000	23,946,000	1,030,000	1,030,000
Camping	22%	35%	29%	45%
Public campground	17%	28%	23%	39%
Private campground	10%	18%	15%	28%
Wilderness campsite	5%	8%	10%	17%
Nature park	22%	37%	40%	55%
Sunbathing or sitting on a beach	21%	36%	16%	37%
Well-known natural wonders	17%	31%	30%	54%
Swimming in oceans	16%	34%	16%	35%
Flora/fauna viewing	14%	31%	31%	52%
Wildlife viewing – land based animals	8%	20%	22%	38%
Whale watching	6%	13%	17%	29%
Wildflowers/flora	6%	15%	16%	26%
Bird watching	5%	12%	11%	23%
Fishing	13%	25%	15%	28%
Fresh water	10%	21%	11%	24%
Swimming in lakes	10%	26%	9%	26%
Hiking – Day excursions	10%	24%	13%	34%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals 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.

3. Individual Trip Activities: Culture and Entertainment

By definition, Fairs & Festivals Tourists take trips *in order to* attend various events (see Section III.A, page 16 for a discussion of the individual trip motivators used to define Fairs & Festivals Tourists). They are also motivated to take trips in order to engage in a variety of other cultural and entertainment activities (see Table 16).

For example, approximately 1-in-3 sector members took recent holidays primarily in order to go to an amusement park and/or spectator sporting events. One-in-four were motivated to travel primarily to see historic sites/buildings or to gamble (casino) while 1-in-5 took a trip primarily to visit museums or attend a music, dance or theatre performance. Other popular entertainment trip drivers include country fairs or farmers' markets, zoos (18% each), rock and roll or popular music concerts, or strolling around a city to see architecture (17% each). These, along with many other entertainment activities are, however, more apt to constitute *things to see and do* than the *motivation* for overnight trips.²¹

Any Participation

Even more Fairs & Festivals Tourists attend the events used to define the sector as "one-of-many" trip activities than are motivated to take overnight pleasure trips in order to attend them. For example, 1-in-4 have taken a trip to attend a *fireworks display* (24%, main) but 1-in-3 have gone to this type of event on a recent holiday (36%, any). Similarly, 1-in-6 sector members took trips in order to go to a *carnival* (16%, main) while 1-in-4 went to a carnival as one of their activities on a recent trip (24%, any).

At least two-fifths of Fairs & Festivals Tourists include amusement parks, historic sites, museums, casinos, city strolls to see architecture and movies among their trip activities (*any*).

U.S. Travellers to Alberta

Enthusiasm for most events, festivals, cultural attractions and entertainment activities as *one-of-many* on recent pleasure trips (*any*) is even more pronounced among Fairs & Festivals Tourists who have travelled in Alberta than it is among sector members as a whole, as shown on the following page. 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 Fairs & Festivals Tourists as a whole. The closer the index score is to 100, the closer to parity the two groups are.

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

Fairs & Festivals Tourists with Alberta experiences over the past decade are especially apt to include international film, literary and/or theatre festivals along with hot air balloon and/or comedy festivals, musical performances and art galleries as activities on their recent overnight pleasure trips. In contrast, they are *less* apt to go to food/drink festivals or gay pride parades than are Fairs & Festivals Tourists in general.

**Index: Any Participation by
All Fairs & Festivals Tourists
versus U.S. Travellers to Alberta**

CULTURAL FESTIVALS/EVENTS

International film festivals	225
Literary festivals or events	175
Theatre festivals	167

Music festivals 116

OTHER FAIRS/FESTIVALS

Hot air balloon festivals	150
Comedy festivals	150

Aboriginal festivals and events 144

Ethnic festivals 119

Exhibitions or fairs 116

Carnivals 104

Firework displays 103

Religious festivals 100

Food/drink festivals	85
Gay Pride parades	67

Farmers' markets or country fairs 125

OTHER CULTURAL ACTIVITIES

Music performances	184
Art galleries	168

General history museum 138

Strolling around a city to see architecture 133

Historic sites/buildings (any) 126

ENTERTAINMENT

Aquariums 134

Zoos 130

Movies/cinema 115

Free outdoor performances 114

Rock & roll/popular music concert 112

Casinos 107

Amusement parks 102

SPECTATOR SPORTING EVENTS 118

The vast array of cultural and entertainment activities engaged in by Fairs & Festivals Tourists attests to their eclectic and wide-ranging interests. They describe themselves as tourists who want to return home from their trips with *lasting memories* and the feeling that they have *seen and done something new and different*.²² Thus, when marketing Alberta's events to them, consideration might be given to a *menu* that highlights Alberta's unique events and sites and the activity choices of Fairs & Festivals Tourists who have already been to Alberta.

- Such a menu might include Aboriginal cultural events, architectural walking tours of cities, major sporting events, general history museums, and farmers' markets.
- On the lighter side and to provide evening entertainment, casinos, fireworks displays, and theatre or music performances might also be included on the menu. The menu concept might convey to potential Fairs & Festivals Tourists that Alberta offers *many things for adults to see and do* – a highly important factor in destination selection for these tourists.²³

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

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

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

	Fairs & Festivals Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(6,410)	(6,410)	(298)	(298)
Weighted, Projected	23,946,000	23,946,000	1,030,000	1,030,000
<i>In rank order by main reason within each subgroup</i>				
Cultural Festivals/Events				
Music festivals	21%	25%	19%	29%
Theatre festivals	4%	6%	6%	10%
International film festivals	3%	4%	6%	9%
Literary festivals or events	2%	4%	3%	7%
Other Fairs/Festivals				
Firework displays	24%	36%	21%	37%
Exhibitions or fairs	23%	31%	25%	36%
Food/drink festivals	20%	27%	17%	23%
Religious festivals	17%	19%	15%	19%
Carnivals	16%	24%	16%	25%
Ethnic festivals	11%	16%	13%	19%
Aboriginal festivals and events (e.g., pow wows)	7%	9%	11%	13%
Hot air balloon festivals	6%	8%	11%	12%
Gay Pride parades	4%	6%	3%	4%
Comedy festivals	2%	4%	3%	6%
Farmers' markets or country fairs	18%	32%	20%	40%
Other Cultural Activities				
Historic sites/buildings (any)	26%	50%	36%	63%
Historic sites - well-known	18%	41%	24%	55%
Historic sites – other	15%	35%	22%	48%
Art galleries	10%	25%	18%	42%
Museums (any)	20%	43%	33%	62%
General history museum	11%	29%	19%	40%
Performing Arts (any)	20%	33%	29%	49%
Live theatre	12%	23%	20%	35%
Music performances	11%	19%	18%	35%
Strolling around a city to see architecture	17%	43%	25%	57%
Entertainment				
Amusement parks	35%	47%	32%	48%
Casinos	26%	46%	26%	49%
Zoos	18%	33%	25%	43%
Aquariums	16%	32%	22%	43%
Rock & roll/popular music concert	17%	26%	14%	29%
Free outdoor performances	14%	29%	10%	33%
Movies/cinema	13%	40%	17%	46%
Spectator sporting events	30%	40%	33%	47%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals 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 Fairs & Festivals Tourists (27%, main) and are used for lodging by over two-fifths of these travellers (44%, any) (see Table 17). Seaside resort experiences (15% *main*; 26% *any*) are more widely sought than are the types of resort experiences available in Alberta – ski or mountain resorts (8% *main*; 14% *any*) or wilderness lodges (5% *main*; 7% *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 Fairs & Festivals 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 ski/mountain resort as are Fairs & Festivals Tourists in general.**

Food & Wine

Collectively, food and wine activities drive trips for 4-in-10 Fairs & Festivals Tourists and 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 Fairs & Festivals Tourists in total and members of this sector who have travelled in Alberta over the past decade.

Shopping

Shopping for apparel, books or music, and local arts and crafts is a common trip pastime for Fairs & Festivals 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 Fairs & Festivals 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 Fairs & Festivals 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*	Fairs & Festivals Tourists			
	Total		U.S. Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(6,410)	(6,410)	(298)	(298)
Weighted, Projected	23,946,000	23,946,000	1,030,000	1,030,000
<i>In rank order by main reason within each subgroup</i>				
Lodging (NET)*	42%	63%	50%	77%
Resorts/Spas	27%	44%	36%	60%
Seaside resort	15%	26%	17%	33%
Lakeside resort	12%	21%	18%	35%
Ski/mountain resort	8%	14%	14%	27%
Wilderness/remote lodge	5%	7%	8%	13%
Food & Wine	42%	84%	51%	90%
Dining – restaurants offering local ingredients and recipes	17%	65%	20%	76%
Wineries – day tours/tastings	11%	26%	19%	37%
Local outdoor cafes	8%	39%	11%	50%
Dining – high end restaurants with international reputation	8%	27%	12%	34%
Dining – other high end restaurants	8%	33%	11%	42%
Shopping	24%	78%	27%	86%
Clothing, shoes, jewellery	15%	57%	15%	56%
Bookstores or music stores	11%	48%	16%	67%
Local arts & crafts studios	10%	42%	13%	57%
Antiques	9%	34%	14%	44%
Gourmet foods	6%	26%	9%	33%

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 fair or festival. *U.S. Travellers to Alberta* are Fairs & Festivals 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 Fairs & Festivals 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-fifth of Fairs & Festivals Tourists and almost two-fifths of those with travel experience in Alberta over the past decade have recently been overnight cruise passengers (see Table 18). Caribbean cruises are the most popular among these tourists, far surpassing Alaska as a cruise destination among Fairs & Festivals Tourists as a whole. Among those who have been to Alberta in the past ten years, however, Alaska and the Caribbean are almost equally popular cruise destinations.

Of the minority of Fairs & Festivals Tourists who participated in *any* overnight group tour (31%), about equal proportions claim to have taken an **organized** overnight group tour (19%) as to have taken **self-directed** touring trips over a two-year period (17%). Those who have gone on an overnight organized tour do not display a preference for tours to *single* versus *multiple* destinations. A very similar pattern is evident among the appreciably *higher* proportion of Fairs & Festivals Tourists who have been to Alberta in the past decade and have participated in any overnight group tour in the past two years (53%).

Taking a day tour while on an overnight trip is slightly more characteristic of Fairs & Festivals Tourists (38%) than is taking any type of overnight tour (31%). Among sector members with Alberta travel experiences, same-day excursions on overnight trips (54%) and overnight tours (53%) are equally popular.

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 Fairs & Festivals Tourists who take *self-directed* day touring excursions.²⁴

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

TABLE 18: CRUISES/GROUP TOURS	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Took any overnight cruise in past 2 years	21%	38%	20%
Type of Cruise/Destination			
Ocean - Caribbean	11%	20%	10%
Ocean - Other	6%	12%	6%
Ocean - Alaska	3%	15%	2%
Great Lakes	1%	5%	1%
Overnight Touring (NET)	31%	53%	30%
Organized Tour	19%	35%	18%
Multiple Location	12%	28%	11%
Single Location	12%	20%	12%
Self-Directed Touring	17%	31%	16%
Same-Day Touring on Overnight Trip (NET)	38%	54%	37%
Self-Directed Touring	27%	35%	26%
Organized Excursion	23%	39%	23%
Type of Organized Day Tour			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)*	(100%)
City	61%	64%	61%
Countryside	50%	69%	49%
Sightseeing cruise (day excursion)	35%	43%	34%
Wilderness/outdoor	28%	44%	27%
Casino	23%	29%	22%
Wineries	19%	37%	17%
Factory	10%	20%	9%
Airplane/helicopter (pilot or passenger)	7%	23%	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 fair or festival. *U.S. Travellers to Alberta* are Fairs & Festivals 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 Fairs & Festivals Tourists with no trips to Alberta reported over the past decade. *Caution: small base size.

VI. Trip Planning

A. Who Does the Planning?

Almost all Fairs & Festivals 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 festival/event enthusiast or is shared with other household members.

TABLE 19: TRAVEL PLANNING	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Frequency of personal involvement in trip planning, past 2 years			
All	64%	68%	63%
Most	18%	15%	18%
Some	10%	10%	10%
None/not stated	8%	7%	8%
Main responsibility for trip planning			
Respondent	41%	45%	40%
Shared with other household member	25%	23%	25%
Spouse/partner	16%	17%	16%
Other/not stated/not involved in travel planning	19%	15%	19%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals 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 Fairs & Festivals Tourists apart from the internet and personal connections. The **internet** tops the chart for these tourists (73%) and those of them who have been to Alberta over the past decade (72%) (see Table 20). Almost 6-in-10 Fairs & Festivals Tourists rely on their own **past experience** and somewhat less use anecdotal information provided by **friends and relatives**. Close to 4-in-10 festival/event sector members (37%) and noticeably more U.S. Travellers to Alberta (47%) 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 almost 3-in-10 Fairs & Festivals Tourists but about 5-in-10 of the U.S. Travellers to Alberta subset (48%). Other travel information sources that are used by at least 3-in-10 Fairs & Festivals Tourists with Alberta travel experience include **newspaper articles, automobile clubs, travel information received in the mail, visitor information centres, and travel agents**.

In fact, U.S. Travellers to Alberta rely on a wider variety of information sources than do Fairs & Festivals Tourists as a whole, possibly because those with Alberta experience 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, electronic newsletters** and, at a lower incidence level, **trade or sportsmen's shows**.

Travel Information Sources for at least 1-in-3 Fairs & Festivals Tourists

Total		U.S. Travellers to Alberta	
Internet website	73%	Internet website	72%
Past experience	57%	Past experience	67%
Friends/relatives	49%	Friends/relatives	49%
Maps	37%	Official travel guides	48%
		Maps	47%
		Newspapers	46%
		Auto club	41%
		Mailed information	38%
		Visitor information centres	33%

With most Fairs & Festivals Tourists relying on the internet for travel planning and almost 5-in-10 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 (32%) and weekend editions of their local newspaper (35%) and to normally watch **televised travel shows** (55%) than are Americans in the more broadly defined sector. Similarly, U.S. Travellers to Alberta are especially likely to be magazine readers. The most popular periodicals read in a typical month include **home/garden, general interest, entertainment, and/or news magazines**. Their readership of home/garden, and general interest magazines, along with those dedicated to travel (e.g., *Condé Nast, Travel & Leisure*) is noticeably higher than that evident for Fairs & Festivals Tourists as a whole.²⁵

²⁵ More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover.

TABLE 20: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
SOURCES OF TRAVEL PLANNING INFO			
Internet website	73%	72%	73%
Past experience	57%	67%	56%
Advice of friends/relatives	49%	49%	49%
Maps	37%	47%	37%
Any newspaper	30%	46%	29%
Articles	26%	41%	25%
Advertisements	16%	24%	16%
Official travel guides	27%	48%	27%
Visitor information centres	26%	33%	26%
Auto club	26%	41%	25%
Travel information in mail	21%	38%	21%
Travel agent	20%	32%	19%
Travel guide books	14%	22%	14%
Any television	14%	21%	14%
Programs	11%	18%	11%
Advertisements	7%	6%	7%
Electronic newsletters via e-mail	9%	14%	9%
Trade, travel, sportsmen's shows	5%	10%	5%
TRAVEL MEDIA			
Frequently read newspaper Travel Section			
In weekday editions	21%	32%	21%
In weekend editions	24%	35%	24%
Magazines read in typical month			
Entertainment/music (<i>People, TVGuide</i>)	40%	36%	40%
Home/garden	32%	40%	31%
Food/cooking (<i>Gourmet, Bon Appetit</i>)	28%	33%	28%
Health, fitness and well living	26%	29%	26%
General interest (<i>Harper's, New Yorker</i>)	25%	38%	24%
News (<i>Time, Newsweek</i>)	25%	36%	25%
Auto/cycle (<i>Car & Driver, Motor Trend</i>)	23%	31%	23%
Crafts/antiques	23%	23%	23%
Travel (<i>Condé Nast, Travel & Leisure</i>)	18%	32%	17%
Normally watch Travel Shows on TV	39%	55%	39%
Normally visit Travel websites	47%	54%	46%

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

Not surprisingly, *booking* online is less common than is searching for information on the internet. Nonetheless, about half of American Fairs & Festivals Tourists (52%) and those with travel experience in Alberta (53%) claim to have made a travel-related booking online over the past two years or so. For both sector members as a whole and U.S. Travellers to Alberta, accommodation and air tickets are the most common items booked online. Fewer Fairs & Festivals Tourists book car rentals, attractions and package deals on the internet, although booking of these items online is more prevalent among U.S. Travellers to Alberta than among Fairs & Festivals Tourists as a whole.

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 Fairs & Festivals 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 fairs, festivals and events; home and garden and general interest (e.g., *Harper's*, *New Yorker*) magazines 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 Fairs & Festivals 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 Fairs & Festivals Tourists. Based on the high overall rating by Fairs & Festivals Tourists who have been to Alberta over the past decade (7.9 on a ten point scale), the province seems to be achieving this goal.
- More Fairs & Festivals Tourists are apt to be reached through television travel *shows* or programs than through TV *advertisements*.

TABLE 21: WEBSITE USAGE FOR TRAVEL PLANNING	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Used Internet website for travel planning, past 2 years	73% (100%)	72% (100%)	73% (100%)
<u>Internet website(s) used</u> <i>(Among Users)</i>			
Hotel/resort	58%	56%	59%
Travel planning/booking	59%	60%	59%
Airline	49%	60%	49%
Destination marketing organization	39%	51%	39%
Attraction	40%	38%	40%
Cruise	15%	25%	15%
Motorcoach	2%	5%	2%
Other	30%	33%	30%
Any Internet Purchases in Past 2 Years <i>(Among All Overnight Pleasure Travellers)</i>	52%	53%	52%
<u>Items Purchased Online</u> <i>(Among Purchasers)</i>	(100%)	(100%)	(100%)
Accommodation	77%	79%	77%
Air tickets	72%	82%	72%
Car rental	43%	60%	42%
Tickets for activities/attractions	37%	42%	36%
Package deal (2+ items)	23%	31%	23%
Rail, bus, boat tickets	17%	18%	17%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals 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 Fairs & Festivals 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 or so 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 somewhat higher among U.S. Travellers to Alberta (40%) than is the case within the broader market (31%).

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	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	6%	8%	5%
One/some trips	25%	32%	25%
No trips/not stated/not sure	69%	60%	70%
Desired Components of Packages (Among Purchasers of Packages)			
	(100%)	(100%)	(100%)
Accommodation	89%	94%	89%
Transport to destination	83%	90%	83%
Transport at destination	68%	80%	68%
Tickets for activities/attractions	67%	69%	67%
Food and beverage	54%	58%	54%
Other	26%	39%	26%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals 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 Fairs & Festivals Tourists are a **break from the day-to-day environment** and the trip's ability to **relieve stress** (see Table 23).²⁶ 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** while over half hope their trip will help **enrich familial relationships**, allow them to **abandon a fixed schedule** and/or provide the opportunity to **see and do different things**.

U.S. Travellers to Alberta share many of the priorities of Fairs & Festivals Tourists as a whole, although those with experience in Alberta put more prominence on **seeing and doing new and different things, enriching their perspective**, and on expanding their **knowledge of history, other cultures and other places**.

Top Highly Important Benefits in Rank Order Among Fairs & Festivals Tourists

<u>Total</u>	<u>U.S. Travellers to Alberta</u>
Break from day-to-day environment	Break from day-to-day environment
Relax/relieve stress	Create lasting memories
Create lasting memories	Relax/relieve stress
Enrich relationship with partner/children	See/do something new/different
No fixed schedule	Enrich relationship with partner/children
See/do something new/different	No fixed schedule

Benefits with *low appeal* to Fairs & Festivals 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, Fairs & Festivals Tourists might be reminded that Alberta offers *memorable* 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 include experiences they would not find elsewhere. The "special" qualities of the trip can be a combination of unique elements of Alberta's fairs or festivals, other activities of interest to these tourists and the province's outdoor splendour.

²⁶ Consumers were asked to indicate the importance they attach to a variety of possible *benefits* from pleasure travel using a three-point semantic scale ranging from *of no importance* to *highly important*. The figures presented in this section are the proportion of tourists who claim a benefit is *highly important*.

TABLE 23: BENEFITS SOUGHT FROM PLEASURE TRAVEL <i>(Highly important)</i>	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
<i>% Stating "Highly Important" (in rank order)</i>			
Break from day-to-day environment	73%	61%	74%
Relax/relieve stress	72%	60%	72%
Create lasting memories	61%	61%	61%
Enrich relationship with partner/children	56%	53%	56%
No fixed schedule	54%	51%	54%
See/do something new/different	51%	59%	51%
Keep family ties alive	44%	37%	45%
Enrich perspectives	33%	41%	32%
Knowledge of history, cultures, places	28%	37%	28%
Stimulate mind/intellectual challenge	28%	34%	28%
Renew personal connections (non-family)	23%	20%	23%
To be pampered	18%	15%	18%
Stories to share	17%	14%	17%
Physical challenge	16%	17%	16%
Solitude and isolation	13%	12%	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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals Tourists with no trips to Alberta reported over the past decade.

C. Incidence of Summer/Winter Trips

Almost all Fairs & Festivals Tourists say that they have taken an overnight pleasure trip during the summer months and 7-in-10 have taken winter trips (see Table 24). Winter travel is slightly more characteristic of the U.S. Travellers to Alberta segment of the fairs and festivals market. Winter trips among U.S. Travellers to Alberta might include those taken for winter outdoor activities such as alpine skiing, but also might include cruises to the Caribbean or sunbathing on a Florida beach since these tourists have comparatively *low key, low energy* outdoor activity preferences such as sitting on a beach or swimming in oceans (see Section V.B.2 for outdoor activities).

	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Took Overnight Pleasure Trip in Past 2 Years			
In . . .			
Summer	88%	90%	88%
Winter	70%	77%	69%

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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals Tourists with no trips to Alberta reported over the past decade.

D. Memberships in Various Organizations

Auto club membership is characteristic of almost 1-in-2 Fairs & Festivals Tourists (45%) and 2-in-3 U.S. Travellers to Alberta (Table 25). One-third of Fairs & Festivals 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 Fairs & Festivals Tourists as a whole. Those with Alberta travel experience over the past decade are also twice as likely as sector members as a whole to belong to a travel club (16% versus 7%).

TABLE 25: MEMBERSHIPS	Fairs & Festivals Tourists		
	Total	U.S. Travellers To Alberta	Non-Alberta Travellers
Unweighted base	(6,410)	(298)	(6,112)
Weighted, Projected	23,946,000	1,030,000	22,916,000
Auto club	45%	65%	44%
Frequent flyer program	33%	53%	32%
Hotel/car rental loyalty program	25%	38%	24%
Sports club	18%	24%	17%
Community service club	15%	23%	15%
Book/reading club	15%	18%	15%
Hobby club	9%	10%	9%
Nature/environmental club	9%	14%	8%
Travel club	7%	16%	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 fair or festival. "U.S. Travellers to Alberta" are Fairs & Festivals 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 Fairs & Festivals Tourists with no trips to Alberta reported over the past decade.

VIII. Fairs & Festivals Tourists in 2015 and 2025

Based on information provided by the U.S. Census Bureau, the size of the Fairs & Festivals 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 Fairs & Festivals Tourist sector can be assessed.

Growth in the U.S. Fairs & Festivals Tourism Sector

The Fairs & Festivals Tourism market is expected to increase at rates that are essentially the same as those of the U.S. adult population as a whole. Specifically, the market will increase by nine percent between 2006 and 2015, from 23.9 million to 26.0 million; and by eighteen percent between 2006 and 2025, from 23.9 million to 28.2 million.

Growth in the U.S. Fairs & Festivals Tourism Sector – U.S. Travellers to Alberta

Because Fairs & Festivals Tourists have a stronger propensity than U.S. residents as a whole to travel to Alberta over a ten-year period, the growth in Fairs & Festivals 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, Fairs & Festivals Tourists with past experience in Alberta are expected to increase by 13%, from 1.0 million in 2006 to almost 1.2 million in 2015 and to 1.3 million by 2025 (30% 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-third of Fairs & Festivals Tourists who are 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 Fairs & Festivals tourism experiences in Alberta – those who have already experienced some of the tourism goods and services Alberta offers – would be about 369,000 in 2015 and about 426,000 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%
Fairs & Festivals Tourists				
Current	23,946,000		1,030,000	
2015	25,994,000	9%	1,159,000	13%
2025	28,150,000	18%	1,339,000	30%

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 ²⁷	Ontario Tourism Marketing Partnership
Atlantic Canada Tourism Partnership	Parks Canada
Canadian Tourism Commission	Quebec Ministry of Tourism
Department of Canadian Heritage	Statistics Canada
Government of Northwest Territories	Tourism British Columbia
Government of Yukon	Tourism Manitoba
Ontario Ministry of Tourism	Tourism Saskatchewan

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

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

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

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

²⁷ Formerly *Alberta Economic Development*.

B. Definition of Fairs & Festivals Tourists

ATPRC'S SECTORS OF INTEREST	INDIVIDUAL ACTIVITIES
FAIRS & FESTIVALS	
Cultural Festivals/Events	International film festivals
	Literary festivals or events
	Music festivals
	Theatre festivals
Other Fairs/Festivals	
	Carnivals
	Exhibitions or fairs
	Religious festivals
	Food/drink festivals
	Ethnic festivals
	Gay Pride parades
	Firework displays
	Hot air balloon festivals
	Comedy festivals
	Aboriginal festivals and events (e.g., pow wows)

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