

**RESEARCH**

# Canada's Heritage Tourism Enthusiasts – A Special Analysis of the Travel Activities and Motivation Survey (TAMS)

## Executive Summary

**Research  
report  
2002-8**

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# **Canada's Heritage Tourism Enthusiasts**

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

## **Executive Summary**

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## I. Introduction

Canada offers a wide range of tourism experiences to its residents. In order to obtain a better understanding of the potential size, characteristics and interests of Canadian activity-based market segments, the Canadian Tourism Commission (CTC) commissioned Research Resolutions & Consulting Ltd. to undertake special analyses and reports based on the Travel Activities and Motivation Survey (TAMS). This report focuses on **Heritage Tourism Enthusiasts** -- Canadians who have taken leisure trips in Canada and exhibit a particular interest in heritage-oriented activities when they travel. As such, they have taken leisure trips in Canada and, in many cases, to other destinations in the past couple of years and have included at least four of the following activities on these trips.

- Aboriginal cultural experiences in a rural setting
- Pow Wow/other Aboriginal celebration
- Aboriginal attractions
- French Canadian cultural experiences
- carnivals such as Caribbana
- western theme events
- farmers' fairs or markets
- local festivals or fairs
- children's museums
- general history museums
- science or technology museums
- historical replicas of cities/towns
- historic sites
- pick your own farms / harvesting

These tourists provide a rich source of information for tourism businesses and marketers who want to increase or retain the Heritage Tourism Enthusiast market in Canada in the future.

In addition to a *current* profile of Heritage Tourism Enthusiasts, the TAMS survey has been modified to permit an assessment of the impacts of an aging population on market potential for this group. Using population projections for Canada obtained from Statistics Canada, TAMS data were "aged" twenty-five years into the future. Comparisons of the market size, composition, and travel behaviour of Canadians in 2000 with estimates of the market profile in 2026 provide tourism planners and marketers with critical information about the products and services that may be required in the future to attract tourists from Canada's largest market – Canadians travelling in Canada. The final chapter of this report is devoted to the impacts of population changes on the domestic Heritage Tourism Enthusiast market.

Additional reports, featuring profiles of other outdoor and cultural segments in the United States and Canada are available from the CTC. Topics include Soft Outdoor Adventure Enthusiasts, Visual Arts, and Performing Arts Enthusiasts, Wine and Culinary Enthusiasts, and Winter Outdoor Activity Participants.

Toronto  
September, 2002



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## II. Executive Summary

### A. Heritage Tourism Enthusiasts: Market Size

- Of the 23.3 million Canadian adults in 2000, about 2.6 million are Heritage Tourism Enthusiasts (11%). Of these, over 8-in-10 claim to have taken a leisure trip within Canada during the past two years or so. Thus, the domestic market for Canada's heritage products is approximately 2.2 million adults.
- Canadians from all parts of the country are represented in the Heritage Tourism Enthusiast segment. With some variations, they mirror the adult population distribution of Canada as a whole. Variations include Quebec and Ontario. Quebec represents one-quarter (25%) of the Canadian adult population but only one-sixth of heritage enthusiasts (17%). Conversely, Ontario residents are over-represented within the Heritage Tourism Enthusiast segment (42%) compared to their proportion of Canada as a whole (38%).
- Since many Canadians concentrate their travel *within* the province or region in which they live, it is not surprising that the three most populous provinces -- Ontario, Quebec and British Columbia -- achieve the highest share of Heritage Tourism Enthusiasts. Smaller numbers of Canadians live in Atlantic Canada, Alberta and Manitoba/Saskatchewan and, as a consequence, lower proportions of Heritage Tourism Enthusiasts claim to have taken leisure trips to these destinations in the past couple of years: Atlantic Canada (28%), Alberta (30%) and Manitoba/Saskatchewan (17%).
- Some regions can be said to have particularly high "attraction rates" compared to others because they lure high levels of Heritage Tourism Enthusiasts relative to their resident populations. Those that are especially successful in attracting Heritage Tourism Enthusiasts over a two year period relative to their share of the Canadian adult population include Atlantic Canada (3.5), Alberta (3.3) and, to a lesser extent, British Columbia (2.8). About three times as many Heritage Tourism Enthusiasts claim to have visited these regions than their share of the total adult population would suggest.
- Ontario is the least successful in attracting domestic heritage tourists relative to its population -- this province represents 38 per cent of the country's adults and 54 per cent of Heritage Tourism Enthusiasts, for an "attraction rate" of 1.4. Quebec falls between the high levels evident for Canada's eastern and western regions, representing 25 per cent of the adult population and attracting 44 per cent of Heritage Tourism Enthusiasts over a two year period, for a 1.8 "attraction rate".
- The U.S.A., followed at a considerable distance by the United Kingdom and other European countries are strong competitors as destinations among Heritage Tourism Enthusiasts.

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## B. Heritage Tourism Enthusiasts: Demographic Characteristics

- Compared to the total market for all leisure tourism experiences over the past couple of years, domestic Heritage Tourism Enthusiasts are substantively under-represented among younger Canadians, and especially among those between 18 and 34 years. This age group represents 1-in-3 domestic travellers as a whole (33%) but only 1-in-4 Heritage Tourism Enthusiasts (25%).
- Most Heritage Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. About one-third are likely to be in the market for heritage tourism experiences that take into account the interests and needs of teenagers or children (34%).
- Heritage Tourism Enthusiasts are also somewhat more affluent than is the “typical” domestic traveller in Canada, with an average household income of \$60,000 compared to \$54,900 for the typical leisure visitor in Canada (1998 dollars). Higher household incomes are consistent with higher levels of formal education: over one-quarter of Heritage Tourism Enthusiasts have at least one university degree (28%) and a further 42 per cent have had some post-secondary education.

## C. Heritage Activities among Heritage Tourism Enthusiasts

- By definition, Heritage Tourism Enthusiasts participate in multiple heritage-related activities while on trips. They may have engaged in these activities while on a recent trip in Canada or on trips to other destinations, worldwide. The most popular heritage activities – sought by between one-half and one-third of these tourists while on a trip in the past couple of years – span museums, farmers’ markets, festivals and historic sites.

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### Activities Engaged in by more than 30% of Heritage Tourism Enthusiasts

- General history museums (86%)
  - Farmers’ fairs or markets (67%)
  - Local festivals or fairs (65%)
  - Science & tech museums (58%)
  - Historic sites (55%)
  - Historical replicas of cities/towns (54%)
  - Pick your own farms / harvesting (39%)
  - French Canadian cultural experiences (31%)
- Other heritage activities that attract between 10 per cent and 30 per cent of Heritage Tourism Enthusiasts include children’s museums, western theme events such as the Calgary Stampede, and Aboriginal cultural experiences or attractions.

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### Activities Engaged in by 10% to 30% of Heritage Tourism Enthusiasts

- Children’s museums (25%)
- Western theme events (19%)
- Aboriginal cultural experiences (18%)
- Aboriginal attractions (16%)

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## D. Overlap With Other Activity-Based Segments

- Canadian Heritage Tourism Enthusiasts with recent leisure travel experiences in their own country have relatively wide-ranging tourism interests, with a particular emphasis on the *outdoors*.
- The 2.2 million Heritage Tourism Enthusiasts share the travel interests of Visual Arts Enthusiasts – two-fifths are also in this market segment (858,000) and, to a lesser extent with Performing Arts Enthusiasts (26%, or 568,000). They are also likely to seek outdoor adventure tourism activities on their travels (40%, or 864,000) including alpine skiing (24%, 526,000) and other winter outdoor activities (35%, 753,000).
- These overlaps suggest considerable opportunities for cross-market packaging and promotion of indoor and outdoor tourism products within the domestic Heritage Tourism Enthusiast market.

## E. Image Challenges & Media Sources

- Even though they are Heritage Tourism Enthusiasts, these Canadians proffer their highest ratings of Canada for attributes that are associated with the *outdoors*:
  - ⇒ A place with beautiful scenery
  - ⇒ One of best destinations for outdoor activities
  - ⇒ A great place to relax and get away from it all
  - ⇒ A place with lots of things for families to see and do
  - ⇒ A great place for fishing
  - ⇒ A place with lots of things for mature adults to see and do
  - ⇒ One of best summer destinations
- Ratings for having many cultural attractions and events and seeing important historical sites and significant places in history, along with being a place to experience different cultures and ways of life, while relatively favourable, fall below the more outdoor-oriented characteristics highlighted above. These heritage and culture-oriented attributes achieve parity or, more commonly, lower levels of support from Heritage Tourism Enthusiasts than do experiencing adventure and excitement, being safe for visitors, being clean and well cared for, friendliness, and a destination with a lot for young people to see and do.
- Less favourable ratings are accorded attributes associated with shopping opportunities, as a place to experience different cultures including Aboriginal culture, for city life, for respecting the natural environment, as a winter destination, as a place for romance, for experiencing the “good life”, and value for money. Canadians in the Heritage Tourism Enthusiast segment are least positive about their country as a destination with a popular or trendy image.
- Image building and product awareness messages to Heritage Tourism Enthusiasts are likely to achieve the highest reach in daily and weekend editions of local newspapers, including the travel sections of these editions and through the Canadian Automobile Association (CAA). These media outlets have the greatest potential for reaching Heritage Tourism Enthusiasts among those measured in the survey.

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## F. Impacts of Population Changes

- Three fundamental changes in Canada's population structure might be taken into account in tourism planning and product development for domestic Heritage Tourism Enthusiasts over the next two decades:
  - ⇒ Provinces and regions throughout Canada will grow at different rates, with Ontario and British Columbia experiencing the highest growth rates and Quebec and Atlantic Canada experiencing the lowest. At an estimated 37 per cent increase in the adult population of Ontario by 2026 compared to a 27 per cent increase for the entire country, the pool of Ontarians from which Canada has to draw will increase from 8.9 to 12.2 million, and the Toronto CMA will increase from about 3.6 million to 6.1 million by 2026.
  - ⇒ Older people – those who are at least 55 years of age – will represent an increasingly sizeable proportion of the Canadian population. They currently account for over one-quarter of the adult population (28%) but will represent over two-fifths by 2026 (42%).
  - ⇒ Canadian residents born outside Canada will increase from about 21 per cent now to 28 per cent by 2026, with much of this increase being absorbed by major urban centres that act as reception centres for new Canadians, and particularly Toronto and Vancouver. By 2026, more than half of adult residents of each of these metropolitan areas will have been born outside Canada.

## G. Implications for Heritage Tourism Enthusiasts

- There will be an increase in the absolute number of Canadians who will be in the market for heritage activities between 2000 and 2026, from an estimated 2.6 million now to about 3.7 million in 2026. Canada's likely share of this market – those who will seek heritage experiences and take leisure trips within Canada – is also expected to grow from 2.2 million to 3.0 million.
- These growth rates are *higher* than the population growth rate of Canada as a whole, primarily because heritage activities tend to appeal to older people and to those who are born outside Canada. Just as the older end of the age spectrum will increase as a proportion of the total population over the next two decades, so too will the market for heritage tourism, so long as changes are made in the amenities and services offered by tourism businesses who serve this market segment to accommodate the needs and interests of an increasingly aging population.
- And just as the proportion of new Canadians *increases* over the next two decades, so too will the market for heritage activities. It is not, however, a foregone conclusion that these new heritage tourists will seek fairs, festivals, museums and cultural events *in Canada*. New Canadians display a strong tendency to take their leisure trips to destinations outside North America. While they provide opportunity for Canada's heritage tourism products, new Canadians may require special cultural amenities (e.g., language, dietary needs, religious observances, etc.) to encourage them to explore *Canada's* heritage products.

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## H. Summary

- The domestic Heritage Tourism Enthusiast market for Canada is characterized by its concentration in older age groups, its affluence and its high level of post-secondary education.
- Cultural activities with the greatest appeal to these tourists include museums, festivals, fairs and markets.
- Of the market segments of special interest to the CTC, domestic Heritage Tourism Enthusiasts currently represent the largest *cultural* pool of potential visitors for Canada's heritage tourism businesses – 2.6 million adult Canadians. Of this sizeable pool, over 8-in-10 have taken recent leisure trips in Canada (2.2 million), leaving some opportunity for growth. Segments that attract more Canadians than heritage include soft adventure outdoors and winter sports participants.
- The strong link between Heritage Tourism Enthusiasts and outdoor enthusiasts creates cross-marketing and packaging opportunities with outdoor products. Such opportunities may have to recognize the need for varying levels of physical exertion so that tourism businesses can continue to attract the energetic, action-oriented youth and family markets but can also attract the increasing number of older Canadians who may retain their interest in the outdoors but will require gentler outdoor experiences.
- The potential domestic market has considerable growth potential over the next two decades, in large part because it appeals to older Canadians – the segment that will experience the greatest “growth spurt” between now and 2026.
- Additional growth opportunities for Heritage Tourism Enthusiasts may come from the increase in the proportion of new immigrants to Canada. New Canadians exhibit a strong tendency to seek heritage experiences when they travel . . . but they are more reticent than Canadian-born residents to visit *Canadian* destinations. The heritage tourism sector will likely be challenged to find ways to encourage the increasing numbers of new Canadians to take leisure trips in their adopted country.
- Image building for Canada's heritage products over the next two decades will likely be required to increase the enthusiasm of Heritage Tourism Enthusiasts for destinations in Canada vis à vis the U.S.A. and Europe.