Cultural-Heritage Tourism:

Review of Existing Market Research

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Background

- The Federal-Provincial-Territorial Culture/Heritage and Tourism Initiative (FPTTI) was officially launched in November 2003 as a two-year pilot project that ended in October 2005.

- This partnership between all provincial and territorial ministries responsible for Culture and Heritage and the Department of Canadian Heritage is co-chaired by Manitoba and New Brunswick.

- Three working groups were created to implement this initiative:
    - The Aboriginal Cultures and Tourism Working Group (led first by Alberta and then Saskatchewan);
    - The Building Market-Readiness Capacity Working Group (led by Ontario); and
    - The Economic Benefits Distribution Research Working Group (led by British Columbia).

Products

- The Initiative's aim is to support partnering jurisdictions in ensuring their culture/heritage stakeholders are able to become active in tourism on their own terms.

- The products to date reflect input from each jurisdiction.

- These products were created to stimulate discussion and create opportunities for dialogue between culture, heritage and tourism counterparts.

- The FPTTI partners are responsible for disseminating the products and key messages within their jurisdictions as they deem appropriate.

- The FPT Culture/Heritage and Tourism Initiative Coordination Office is prepared to respond to requests. They can be contacted at FPTTI@pch.gc.ca

Benefits of the FPTTI

- Continued collaboration with tourism counterparts on culture/heritage-driven projects creates opportunities for increased information sharing and strategic partnerships. The FPTTI will continue to develop the tools and information that will enable FPT culture/heritage ministries to:

    1) Provide leadership on cultural and heritage aspects of tourism-related policy;

    2) assist the culture/heritage sector to build capacity in tourism; and,

    3) create and promote understanding that the promotion, retention, and support of Canada's cultures and the sustainability of tourism are mutually reinforcing.

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How to Use This Report

This report provides the summary findings of a large number of primary research studies on consumer attitudes and motivations for a significant number of cultural and heritage sub-markets. It is not exhaustive in that time was limited to gather all the studies, and only those available at no cost and written in English, French, German and Spanish were included.

It has become evident that primary market research related to cultural and heritage tourism is still quite limited at all levels: provincial, national and international. A considerable number of the individuals contacted for the purpose of this were unaware of any market research, and, when asked, provided materials such as, Marketing/ Strategic Plans, Annual Reports, Media Releases, Discussion Papers or website addresses. These publications largely rely on site specific or supply side information, expert opinion and anecdotal evidence, and therefore do not conform to the purpose of this study.

Introduction & Purpose

The importance of culture and heritage tourism has increasingly been recognized both in Canada and worldwide, and is well-accepted as a significant new tourism trend. As a result, in 1997, the Federal-Provincial-Territorial (FPT) Ministers responsible for Culture and Heritage met and directed the FPT Directors of Culture and Heritage (FPTDCH) to take concrete action in the area of tourism and the FPT Culture/Heritage and Tourism Initiative was formed with three working groups.

What is the FPT Culture/Heritage and Tourism Initiative

The FPT Culture/Heritage and Tourism Initiative was mandated by the Federal-Provincial-Territorial (FPT) Ministers responsible for Culture and Heritage to develop Canada's cultural/heritage sector. The "Building Market-Readiness Capacity Working Group" is one of three groups of the Initiative. The goal of the Building Market-Readiness Capacity Working Group is to develop, primarily for the benefit of the culture/heritage sector, Canada's cultural/heritage tourism through collaboration and increased understanding between the cultural/heritage sector and other tourism stakeholders.

The group aims to fulfill this goal by pursuing two main objectives:

- To develop and share a model to strengthen relations between the culture/heritage sector and other tourism stakeholders by undertaking joint projects.
- To build a collaborative approach to developing tourism market-readiness capacity within the culture/heritage sector.

In order to provide an updated culture and heritage specific argument for cultural tourism that reinforces the need for strengthened capacity and collaboration, and in support of the two objectives above, the group needed to identify what current market research exists to substantiate the growing interest in culture/heritage tourism.

Purpose

The purpose of this report is to present a summary of existing primary market demand research on cultural and heritage-related tourism in the last 10 years. Specifically, the research called for:

- The provision of definitions of C/H used by the different regions or survey/reports,
- The analysis of the quality of the methodology and findings of all studies sourced;
- The identification of consumer needs/preferences by different demographic and psychographic groupings;

- A discussion of specific trends impacting and shaping consumers' interests/needs/ requirements in relation to cultural and heritage experiences.
- A profile of how other jurisdictions are responding to these trends (consumer, social, cultural, environmental, technological) with respect to their heritage/cultural tourism product; and
- The creation of an annotated bibliography.

How This Report Is Organized

Shown below are the major sections of this report.

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Executive Summary

Definition

Definitions of cultural and heritage tourism are abundant; some are very broad, others very specific. The definition adopted by the Federal-Provincial-Territorial Culture/Heritage and Tourism Initiative includes the five main categories: 1) performing arts, 2) visual arts and crafts, 3) festivals, 4) museums and cultural centers, and 5) historic sites and interpretive centers.

Growth

Cultural and heritage tourism seems to be growing between 13-15%, significantly faster than travel in general. For most segments, spending is growing somewhat faster than arrivals, making them higher yield.

Demographics

Americans participate in all cultural activities more frequently than do Canadians.

Cultural and heritage travellers tend to be older (age 39 and above) or younger (age 30 and less), well educated, employed and have high incomes. The 39-59-age bracket is a typical age bracket for cultural travelers in Europe with a majority of women (55% in 2002, 52.7% in 2004) in all countries, except for certain segments such as heritage tourism. The younger age groups (20-29) represent the single largest age group that is a very important component of the culture audience (almost 40%). They are particularly important because the cultural experiences they have in their youth influence their tourism behaviour in the future. They also respond well to the youth discount cards which makes cultural attractions particularly accessible to them.

Psychographics

They participate in many more activities than other travellers, and are also interested in activities other than cultural/heritage ones, e.g., outdoor activities.

They are more attracted to smaller establishments (specifically in Europe) with more personalized service or any roofed accommodation (in North America), followed by the home of friends and family.

They are very likely to learn about the cultural destination through the recommendations of friends, travel guides, and increasingly the Internet. The majority does not book transportation and accommodation in advance, and a minority purchase all-inclusive packages. 56% of cultural travellers plan trips at the last minute and only 14.7% purchase all inclusive packages

Daily newspapers and magazines, followed by television programs and club/ association memberships could be the best way to reach both Canadian and American culture and heritage travelers.

Education/learning is one particularly important factor in cultural tourism. Traditional attractions such as museums and galleries are the most important sites, while attending local festivals or fairs are one of the most common cultural activities during trips.

Competitive Environments and Opportunities

The United States, Europe, Sun/Sea destinations, Mexico and the Caribbean are all strong competitors for the Canadian culture and heritage tourism product.

Despite the growing awareness of the importance of cultural tourism, there have been hardly any changes in the major destinations considered to be attractive cultural destinations by Europeans. Rome, Paris and London remain the top three cities. The only non-European destinations considered are New York (12th place), Hong Kong (21st), Buenos Aires (24th), and Capetown (25th).

Various opportunities exist for cultural and heritage tourism in Canada. The United States represent a major potential market for Canada (26.3 million) as does Mexico (20.5% of their outbound market).

The growth of cultural tourism is not just occurring in cities and towns, but also in rural and more remote areas.

Many of the cultural and heritage participants are local, followed by domestic and then international visitors. The domestic market is very important for most cultural tourism attractions in Europe (66% are from within the country). Similarly, visitors to cultural attractions are mainly local residents, followed by domestic and international tourists.There is a strong correlation between participation in various cultural activities while on vacation and at home, especially for art galleries, opera, live theatre and ballet performance. This suggests that travellers hobbies and interests could be good indications of their vacation activities.

There is overlap among cultural segments and also with various outdoor segments, thus there are opportunities for cross-packaging promotions among cultural segments and with various outdoor segments.

Although Canadian destinations have a good reputation, Canada is not currently regarded as a ‘top of the mind’ cultural destination by either domestic or international tourists.

Most cultural travellers want to enrich their lives with new travel experiences in which they can learn something new, thus the trips become more memorable and enjoyable to them. For them, a leisure or vacation trip is not complete without visiting a museum, historic site or landmark or attending a cultural event or arts performance. Thus, there is an opportunity to incorporate culture and heritage learning with other branch of tourism, e.g. Learning Travel, Experiential Travel, Enrichment Travel, etc.

Definition of Culture/Heritage Tourism for the Purpose of This Report

Introduction

Definitions of cultural and heritage tourism are abundant; some are very broad, others very specific. The following are a few that are widely accepted.

IN THIS SECTION …

- What does the World Tourism Organization say?
- What definitions do other countries use?
- What is the definition used by the by the Federal-Provincial-Territorial Culture/Heritage and Tourism Initiative?

World Tourism Organization

In 1985, World Tourism Organization (WTO) provided two definitions of cultural tourism. The narrower definition includes: “movements of persons for essentially cultural motivations such as study tours, performing arts and cultural tours, travel to festivals and other cultural events, visits to sites and monuments, travel to study nature, folklore or art, and pilgrimages.’ The wider definition includes: ‘all movements of persons, … because they satisfy the human need for diversity, tending to raise the cultural level of the individual and giving rise to new knowledge, experience and encounters.’ [Richards, Cultural Tourism in Europe, 2000: 23].

Europe and Australia

Within Europe, the European Commission and the Association for Tourism and Leisure Education (ATLAS) definition of cultural tourism is still used: ‘The movement of persons to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs’ (cultural definition) and ‘All movements of persons to specific cultural attractions, such a heritage sites, artistic and cultural manifestations, arts and drama outside their normal place of residence’ (technical definition). [Richards, Cultural Tourism in Europe, 2000: 24].

In an earlier seminal study on the cultural tourism market in Europe, the following definitions had been proposed: culturally motivated (those who choose a destination based on its cultural offerings), culturally inspired (those who visit well known cultural icons), and culturally attracted (those who include cultural events and attractions as part of their trips) [Bywater, The Market for Cultural Tourism in Europe, 1993]. These definitions have also been adopted in Quebec's study on "Culture and Urban Tourism" [Archambault & Caron, Culture et Tourisme en Ville: une Affaire de Créativité, 1999].

Australia defines a cultural traveler as a person who stayed more than 40 kilometers away from home for at least one night and attended a cultural venue (art gallery, museum, animal/marine park/botanical garden, library, popular/classical music concert, theatre, dance, opera or musical theatre, other performing arts, and cinema) [Australian Bureau of Statistics, 1997].

Canada

In Canada, cultural/heritage tourism occurs when participation in a cultural or heritage activity is a significant factor for traveling [CTC Packaging the Potential 1999: 2]. Most of the insight gained into various segments of this market are derived from the Travel Activities and Motivation Survey (TAMS), which distinguishes between enthusiasts (those who participate in a multiple of segmentation specific activities), seekers (those who participate in at least one segmentation specific activity occasionally or frequently) and minimalists (those less likely than others to participate in most cultural and entertainment activities, but who had taken an urban trip).

The definition used for the purpose of this study by the FPT Culture/Heritage and Tourism Initiative covers the meanings suggested above, but also narrows it down to five main categories for the purpose of this research:

- Performing Arts,
- Visual Arts and Crafts,
- Festivals,
- Museums and Cultural Centers, and
- Historic Sites and Interpretive Centers.

[FPT Culture/Heritage and Tourism Initiative First Semi Annual Report, 2004]

These categories are the basis for the annotated bibliography covering the primary research studies. In addition, the specific definitions used in each study are provided.

Overlap with other forms of tourism

Other areas closely associated with culture and heritage are: Aboriginal Tourism, Language Learning Tourism and Culinary Tourism. [CTC Packaging the Potential 1999: 3]. In addition, niche markets such as Enrichment Tourism, Experiential Tourism and Learning Tourism also tend to have culture and heritage as their underpinning, but not necessarily as their primary motivation. Similarly, food and drink (e.g., wine, beer, coffee, tea) have long been associated with a country's culture and agricultural heritage. Hence, forms of tourism based on food and drink are often included as part of cultural and heritage tourism.

It has also been argued that sports can be an important aspect of a country's culture and heritage, for example hockey in Canada, but for the purpose of this study, a narrower definition was adopted.

Prince Edward Island furthermore identified the principles underlying culture and heritage: authenticity, uniqueness, preservation and protection, quality, superior customer service, cooperation and equal participation, island-wide in scope and experience diversity [A Strategy to Develop Cultural and Heritage Tourism for Prince Edward Island, 2004]

Review of Existing Market Research

Introduction

The vast majority of the market research studies received and that qualified under the definition for culture and heritage tourism as adopted by this report were conducted in North America. Many of them derive directly from the Travel Activities and Motivation Survey (TAMS), with segmentation studies prepared either by Lang Research Inc. or by Research Resolutions and Consulting Ltd. for the Canadian Tourism Commission, the Department of Canadian Heritage, or the Ontario Ministry of Tourism and Recreation. TAMS was also used as a foundation for other market research and graduate theses. The U.S. research is mainly derived from The Travel Industry Association of America (TIA) and Smithsonian Study in 2003.

The remaining bibliographical sources are a combination of publications received from provincial authorities in Canada, and internationally. Two major European market research studies are by the European Commission and the Association for Tourism and Leisure Education (ATLAS). Considering the importance of cultural and heritage tourism in Europe, the number of studies in the public domain was surprisingly limited. Many of the publications received are in the form of a descriptive analysis of cultural and heritage tourism or are general market research studies, in which cultural and heritage tourism only represents a small portion (if any).

Australia and New Zealand are the only two countries representing Asia Pacific, while Mexico is the only Latin American country, for which research was located. No studies, except for some work on behalf of commercial interests, were found for Asia and Africa. This is in keeping with the lack of primary market research in these countries in general.

It would appear that serious research interest in the potential of cultural and heritage tourism at the macro level is relatively recent in most countries, a situation that has not changed much in the last few years [Archambault & Caron, Culture et Tourisme en Ville: une Affaire de Créativité, 1999].

IN THIS SECTION…

- Which regions of the world have undertaken market research?
- What is the market for culture and heritage tourism?
- What are the demographic and psychographics of this market?
- What are its media and accommodation preferences?
- What image challenges and population changes is it facing?

Geographical Overview

According to TAMS, minimalists were more prevalent in Canada than in the United States (35 %), reflecting the higher participation rate in cultural and entertainment activities among Americans. Relative to Canadian urban travellers, Americans were 141 % more likely to be Entertainment Seekers. Americans were also somewhat more likely to be classified as Culture Seekers and Knowledge Seekers than Canadians. [Lang Research, Culture and Entertainment Segmentation, 1001:9] The top ten US cities in terms of population pursuing cultural activities, are: Boston, Chicago, Dallas, Detroit, Houston, Los Angeles, New York City, Philadelphia, San Francisco and Washington D.C.

In general, Americans travel to a greater number of destinations than Canadians due to a much higher incidence of inter-state travel by Americans (33% vs. 13% for Canadians). Americans have an east-west orientation, while Canadians have a north-south orientation. Europeans, on the other hand, tend to favour European destinations for cultural and heritage tourism. [TAMS Overview Report, 2001)

Travel to Canada from the United States

13% of the US adult population (18+) took at least one overnight pleasure trip to Canada in the past two years, with the most frequent visits to Ontario (7.2% visiting at least once), British Columbia (4.0%) and Quebec (3.3%). The highest incidence of travel to Canada comes from Americans living along the Canadian border, particularly in urban centers, with Detroit, Boston, Chicago, New York City and Seattle as the generators of the largest number of trips to Canada. Among Culture Seekers, there was relatively little variation across the various regions of the United States: The South Atlantic, Pacific/ Hawaii, Middle Atlantic and New England regions represent a high of 11% each, while the West North Central and East North Central regions are at a low of 8% each.

The TAMS 2003 reports pointed out that Quebec attracts travelers in the performing arts sectors, while both Quebec and Atlantic Canada attract disproportionately high levels of Americans in the heritage, performing arts, visual arts and wine/culinary segment. Ontario has special appeal to travelers interested in wine/culinary activities, while British Columbia has lower appeal for its cultural related activities [TAMS Activity-based Tourism Segments In Canada and the USA: An Overview, 2003].

Travel within Canada by Canadians

Ontario, Quebec, Alberta and British Columbia were the four most visited provinces by inter-provincial pleasure travelers. In Atlantic Canada, Manitoba and Saskatchewan, the number of intra-provincial trips was comparable to the number of inter-provincial trips. In general, the highest incidence of travel was from a neighbouring province with very few exceptions. Culture Seekers are likely to originate from Quebec (9%),Ontario, BC, and Nova Scotia (8% each). Part of the reason is that the larger provinces could be more likely to offer opportunities to experience and cultivate an interest in culture. [TAMS Culture and Entertainment Segmentation Report, 2001]

In general, major urban centers are hubs for cultural activities. The top four Canadian cities, in terms of population pursuing cultural activities, are: Edmonton, Montreal, Toronto and Vancouver. These differences, partially, may reflect the fact that many cultural activities are more readily available in larger urban centers [TAMS Overview Report, 2001].

Eastern and western Canada have appreciably higher attraction rates than do Ontario and Quebec among Canadian travellers in general, therefore luring a higher proportion of their tourism from outside their regions (ranging between 2.4 and 2.8% compared to Quebec at 1.5% and Ontario at 1.3%). Atlantic Canada has special appeal to Canadians interested in heritage, performing arts and wine/culinary tourism, while British Columbia is the most popular market for visual arts and wine/culinary enthusiasts, and Alberta ranks highly among heritage tourism enthusiasts. In contrast, Ontario and Quebec exert a comparatively lower attraction for most activity-based market segments. Nevertheless, Quebec has particular appeal for wine/culinary tourism [TAMS Activity-based Tourism Segments In Canada and the USA: An Overview, 2003].

Europe

Historically, Europe is well-known for its cultural and heritage tourism. There have been hardly any changes in recent years in the ranking of cities that Europeans consider to be significant cultural destinations: Rome (rating 51/60), Paris (49/60) and London (34/60) are always the top three. A fairly consistent group of cities, including Athens (33/60), Florence (32/60) and Barcelona (29/60), contest the second rung on the ladder. New York (17/60) was the only North American destination represented, ranked 12th out of 29 cities worldwide. Other non-European cities in the ranking are Hong Kong (21st place with a rating of 8/60), Buenos Aires (24th place with 5/60), and Capetown (25th place with 4/60) [Atlas Cultural Tourism Research Project, 2004].

Market Size and Competition

The domestic market is very important for most cultural tourism attractions in Europe. About 36% of the survey respondents were locals, less than one third were foreign travelers, and the remaining were travelers from within the country [Atlas Cultural Tourism Research Project, 2002]. This is also borne out in the visitation to the European City of Culture, a program that aims to raise the international profile of the title-holding city and its region, through cultural activities and arts events. Local residents represent 30-40% of visitors, same day excursionists 10-20%, domestic tourists 30% and foreign visitors 10-20% [European Cities and Capitals of Culture, 2004]. “Tourism is a subjective term, there is little consistent data on its true market profile, and only indirect conclusions can be drawn on its true size, growth and potential” [R. Hammond, 2004].

WTO estimates that cultural tourism is growing at a rate of 15%/year and that

37% of all international travel includes a cultural component [G. Thornton, 2002]. However, Greg Richards, co-coordinator of the ATLAS Cultural Tourism Research Project, pointed out that the market size is approximately 5-8%, if the narrow term of cultural travelers is used (only includes those who are motivated by culture and specifically go on holiday to visit a cultural attraction – see the ATLAS definition on p. 6).

Americans show higher potential than Canadians

Canada's culture and heritage is an important and growing source of experiences sought by many travelers. The potential market from the United States to Canada is higher (26.3 million) than the domestic potential market (14 million) [TAMS Culture and Entertainment Segmentation Report, 2001].

Top 3 Activity-based Market Segments	Canada	U.S.
Heritage Tourism Enthusiasts	2.2 million	8.3 million
Visual Arts Enthusiasts	1.7 million	7.0 million
Wine/Culinary Enthusiasts	1.5 million	5.5 million

Source: TAMS Activity-based Tourism Segments In Canada and the USA: An Overview, 2003

Significant culture/heritage travel growth by Americans

However, 56% of the U.S. adult population (118.1 million) are culture/heritage travelers, mostly domestically, who have included at least one of fifteen arts, humanities, historic or heritage activities or events while traveling in 2002. In fact, the culture/heritage travel volume has increased by 13% since 1996, (from 192.4 million to 216.8 million person-trips), which is twice the growth of overall travel [TIA/Smithsonian, 2003].

Strong competition for culture and heritage products

As highly motivated as culture and heritage travelers appear to be, this does not mean that they will not consider other types of destinations and experiences. For instance, Canada's cultural and heritage tourism product competes with destinations in the United States, Europe, Mexico and the Caribbean, and indeed even straightforward sun and sea holidays, in the domestic, U.S. and European markets. Canadian wine/culinary, visual arts and performing arts tourists especially show a strong inclination to visit sun and sea destinations, making the Caribbean and Mexico particularly strong competitors. [TAMS Overview Report, 2001].

The United States is strong in capturing its own domestic market for wine /culinary and visual arts tourism, as it is seen to have strong competitive advantages in these product categories.

Mexico has potential for Canada

Mexico's outbound market has been fairly stable in the recent past (57.0% have not altered their travel behaviour due to events in the last few years). After the US (91.9%), Europe (27.4%) and Canada (20.5%) are the next most popular destinations. 14.1% took a trip to Canada for vacation or to visit family in the past three years. They also tend to appreciate travel for its educational value and overwhelmingly consider international travel an investment in the education of their children. On their international trips, affluent Mexicans place a high value on comfort and convenience and tend to be ready to pay a premium to treat themselves and their families to top-quality experiences and services. [Mexicans as International Travelers Action-oriented information for marketing decisions, June 2003].

Demographic Characteristics

This sections covers:

- Age group, gender and household composition
- Income, education and employment

Age group, gender and household composition

The demographic profile of the cultural heritage travel segment today is younger, wealthier, more educated and more technologically savvy when compared to those surveyed in 1996. However, the general cultural and heritage tourism market in Canada and the United States is composed of older travelers than are the outdoor oriented activity segments: Indeed, for all segments, Americans are considerably older than Canadians.

Canada and the United States

	Average Age in years	
Activity-based Market Segments	Canada	U.S.
Outdoor oriented		

Hard Outdoor Adventure	33.4	39.0
Soft Outdoor Adventure	39.2	44.1
Winter Outdoors (excluding alpine skiing)	40.2	43.5
Alpine Skiing	35.7	40.1
Culture and Heritage		48.9
Heritage Tourism	45.1	49.2
Performing Arts	42.9	47.4
Visual Arts	43.3	48.2
Wine/Culinary	46.5	

Source: TAMS Overview Report, 2001

Heritage tourism enthusiasts are evenly divided between men and women in both the United States and Canada, however other cultural segments are dominated by women in Canada: performing art (63%), visual arts (63%), and wine/culinary (54%) [TAMS Heritage Tourism Enthusiasts (2000-2001), Performing Arts Enthusiasts (2003), Visual Arts Enthusiasts (2003) and Wine/Culinary Tourism Enthusiasts (2003) Reports].

Consistent with the aging of these markets, performing arts, visual arts and wine/culinary enthusiasts are more likely to live in adult-only households. Thus, they are less likely to seek travel experiences that would appeal to children less than 12 years of age than are younger outdoor segment members [TAMS Overview Report, 2001].

Europe

In general, cultural travelers tend to be female (55% in 2002, 52.7% in 2004) and in the 39-59 age bracket, although younger people represent a very important component of the culture audience. The single largest age group is in the 20-29 age range, and almost 40% of travelers are under 30. The importance of this youth market to cultural tourism is not only that they visit cultural attractions when they are young, but also because the cultural experiences they have in their youth influence their tourism behaviour in the future. Youth discount cards make these cultural attractions particularly accessible to them. [European Commission report and Atlas Cultural Tourism Research Project, in Travel and Tourism Analyst No.20: 23, 2004].

European cultural travelers have broader travel experience, are more quality conscious and sensitive to environmental and social concerns. They are reported to regularly take holidays outside normal peak seasons. Coupled with the fact that Europe's population is "getting older but staying active longer, means that seasonality should be seen as an opportunity rather than a threat for this form of tourism." [European Commission report in Travel and Tourism Analyst No.20: 23].

Income, Education and Employment

Cultural and heritage segments tend to have higher incomes than many of the outdoor market segments. In Canada and the US, wine/culinary enthusiasts are one of the two most affluent market segments (average income of Cdn$65,500 and US$76,600, respectively).

27% of Canadians and 37% of Americans in this segment have a university degree. This is particularly true of performing and visual arts enthusiasts (36% of Canadians and 41% of Americans). [TAMS Wine/Culinary Enthusiast Report, 2003].

Cultural travelers have very high levels of education. Over 50% of cultural travelers have some form of higher education vs. about 33% of the European Union population, with 37.3% holding a bachelor degree. Furthermore, "higher education levels tend to lead to better jobs and higher incomes." Cultural travelers tend to be employed (50.3%), are students or self-employed (15-16%). "They tend to exercise professional (34%) or managerial occupations (18%) and their incomes are about one third higher than the EU average." [Atlas Cultural Tourism Research Project, 2002].

Psychographics

This sections covers:

- Basic traveler needs
- Trip purposes and activities

Basic Traveller Needs

The market research study of the New Zealand Tourism Strategy (NZTS) 2010 has identified six key need states which apply to both international and domestic travelers, as follows:

1. Energizing (To feel vital and alive)
2. Socializing (To feel social and carefree)
3. Belonging (To feel balanced and bonded)
4. Traditional (To feel safe, comfortable and relaxed)
5. Learning (To feel mentally stimulated and knowledgeable)
6. Exclusive (To feel rewarded and personally satisfied)

The "interactive traveller" has been identified by Tourism New Zealand as the primary target for its international marketing activity. The purpose of this identification is to increase the value of tourism to New Zealand where spend grows at a faster rate than volume. Interactive travellers, who attend many cultural activities are represented in every need state. However, the energizing and learning states are particularly important (80% of travellers are driven strongly by these needs) [Tourism New Zealand's Demand for Cultural Tourism Research Report, 2003].

Trip Purpose and Activities

Europe

Less than 20% of cultural travelers consider that their normal holiday was a cultural holiday, and just over 20% would do so. Even visitors to cultural sites would not generally consider themselves to be cultural tourists. A consistent finding has been that more visitors to cultural sites are on a 'city break' (25%) or 'touring holiday' (28%) with a slightly higher proportion of cultural travellers in 2002 than in the 1997 and 1999 ATLAS surveys. Travellers who 'usually' take cultural holidays represented 29% in 2002 compared to 21.5% in 1997 [ATLAS Cultural Tourism Research Project, 1997-2002].

Traditional attractions such as museums, monuments and galleries were the most important attractions visited by cultural travellers in 2004; over 55% visited a museum, 43% a monument, 38% historic sites, 30% a gallery, and 25% visited traditional galleries. There has been no substantial growth in the proportion of travellers visiting museums since 1997, while visits to monuments lost market share, and visits to art galleries, performing arts attractions and festivals increased their share of travellers. Thus there appears to be a shift from heritage attractions to arts attractions.

The same survey found that travelers value the tangible elements of a trip most. Museums, cultural attractions and historic architecture score highest (about 3.7 on a five point scale) in terms of the image of a destination. On the other hand, multicultural regions received a lower score of 3.5 and culturally distinct regions 3.35. Linguistic diversity received 3.2, regional gastronomy, customs and traditions, and festivals & events 3.15 [Atlas Cultural Tourism Research Project, 2001-2004].

It would appear that the type of event has a strong influence on the type of visitor attracted, e.g. local residents are more strongly represented at theatre performances and tourists are more strongly represented at exhibitions. Information and language barriers appear to be the main reason why tourists are less likely to attend theatre performances [European Cities and Capitals of Culture, 2004].

In a survey of visitors to Ireland, respondents were asked to make suggestions about other cultural activities/factors that would influence a greater level of attendance at artistic performances. The majority suggested that experiences of traditional Irish culture, sites of historic significance, and more live performances should be included on their tours, either as part of the program or as elective options. The most common reasons given for not attending cultural events were that they were not included in the tour and that there was no advance information on schedules and programs. Another suggestion was to provide a sample of a live performance to encourage attendance at paid performances [Tourism & The Performing Arts in Ireland, 2004].

Australia

Experiencing Australian culture was an influencing factor for 5% of visitors to Australia in 1999, while 3% wanted to experience aboriginal culture, and less than 1% to attend a festival or carnival. The extent that 'culture factors' influenced decisions to come to Australia varied according to the main purpose of the visitor's journey. Travelers whose main reason was for a holiday tend to have more desire to experience Australian culture or aboriginal culture [Cultural Tourism Statistics by National Center for Culture and Recreation Statistics of the Australian Bureau of Statistics, 2001].

North America

In North America, **cultural and entertainment activities have gained in popularity.** Visiting museums (35%), attending local festivals or fairs (34%), and art galleries (32%) are common cultural activities during trips. In the heritage segment, the most popular activities include visiting museums (86%), farmers' markets (67%), festivals and historic sites (65%), followed by historical replicas of cities/towns (54%) and French Canadian cultural experiences (31%). For the performing arts segment, the two top activities are theatre (87-92%) and classical music concerts (60-66%). For the visual arts segment, the three top activities are local arts & crafts studios (96-99%), art galleries (98-99%) and international film festivals (8%-12%). For the wine/culinary segment, going to wineries for day visits (73-85%), touring a region's wineries (60-74%), and dining at internationally acclaimed restaurants (58-70%) are the top three activities [TAMS Heritage Tourism Enthusiasts (2000-2001), Performing Arts Enthusiasts (2003), Visual Arts Enthusiasts (2003) and Wine/Culinary Tourism Enthusiasts (2003) Reports]. PEI has noted a trend towards craft shopping, with 69% to 85% of visitors from various Canadian provinces expressing an interest. It is one of the four top activities of visitors to PEI [Prince Edward Island Marketing Plan, 2004].

In general, **Americans participate in all cultural activities more often than Canadians**, e.g., concert attendance (16% vs. 9%), museum visits (12% vs. 6%). According to TAMS Overview Report (2003), this may indicate that the United States has more cultural activities readily available than Canada. Some cultural activities are considered to be emergent, e.g., French Canadian culture, attending national or international sporting events, attending musical festivals, carnivals, literary festivals, and film festivals, suggesting a strong desire for innovation [TAMS Overview Report, 2003].

Among Americans, visiting a designated historic site and/or attending a performing art event (48%) are among the most popular cultural and heritage activities to do while traveling. 30% of the audience (35.3 million) say that their choice of destination is influenced by a specific arts, cultural or heritage event or activity. The TIA/Smithsonian research confirmed these findings and found that 40% (47.2 millions) of travellers will extend their stay because of an arts, cultural or heritage event or activity on many occasions.

Quebec had noted already in 1999 that there was a significant increase in the consumption of cultural product by the domestic market, and suggested that it might lead to an increase in tourism consumption of these products. [Archam-bault & Caron, Culture et Tourisme en Ville: une Affaire de Créativité, 1999]. TAMS confirmed this suspicion in demonstrating a strong correlation between participation in various cultural activities while on vacation and at home; e.g., travelers who visit art galleries at home are 48% likely to do so during vacations (correlation of 0.48). Similarly for opera (0.42), live theatre (0.39) and the ballet (0.34). This finding is consistent with research undertaken in Europe, where a low level of interest in attending a performance while on holiday has been shown to be closely related to a lack of interest in the subject. Having no interest in the subject / performance was the most often cited reason for not attending opera (39%) and cabaret (45%) [Tourism & The Performing Arts in Ireland, 2004]. This suggests that the potential future target market may come from those segments for whom cultural activities have become a way of life [TAMS Overview Reports, 2003]. Indeed, over 50% of cultural and heritage tourists to the United States believe that their hobbies and interests influence where they choose to travel, and that most cultural travellers want to enrich their lives with new travel experiences. 75% of Generations X and Y (ages 18-34) agreed that trips where they can learn something new are more memorable (vs. 63% of Matures aged 55+), and that trips that include cultural, arts, historic, heritage activities or events are more enjoyable (39% agreement). They prefer destinations that have some historical significance (38%). For 29% it is important that the trips they take for vacation or leisure provide cultural experiences. They also believe that such a trip is not complete without visiting a museum, historic site or landmark (26%) or attending a cultural event or arts performance (17%) [TIA/Smithsonian, 2003].

Despite the increasing discussions on **aboriginal-related vacations**, the **level of interest is still limited** compared to other experiences. Interest is substantially higher in the US (26.2%) than in Canada (15.3%) [TAMS Aboriginal Tourism Reports, 2001].

Overlap between Cultural and Non-cultural Activities

Based on the rank order of various activity-based segments, Canadian travellers appear to have a stronger outdoor and winter orientation than do their American neighbours. Among American adults, heritage, visual arts and wine/culinary, and performing arts take 1st, 3rd, 4th and 7th place, respectively, much higher than for Canadians.

There is **significant overlap among** Canadian **cultural segments** (heritage, visual arts, wine/culinary and performing arts). Some **cultural segments also overlap with some outdoor** ones. Similarly, about 50% of Americans in the hard outdoor adventure enthusiast and other winter outdoor segments are

Rank Order - Adults with Recent Travel Experience in Canada	
Canada	United States
1. Soft Outdoor Adventure	1. Heritage
2. Winter Outdoors	2. Soft Outdoor Adventure
3. Alpine Skiing	3. Visual Arts
4. Heritage	4. Wine/Culinary
5. Visual Arts	5. Alpine Skiing
6. Wine/Culinary	6. Performing Arts
7. Hard Outdoor Adventure	7. Winter Outdoors
8. Performing Arts	

8. Performing Arts

Source: TAMS Activity-based Tourism Segments In Canada and the USA: An Overview, 2003.

also heritage tourism enthusiasts, and about 33% of each culture/heritage-oriented segment overlaps with the soft outdoor adventure enthusiast segment [TAMS Overview Reports, 2003].

Awareness of the extent of these overlaps could be useful for packaging and marketing Canada's tourism products.

Media Sources and Booking Preferences

46% of European cultural travellers reported personal recommendations from friends/family as the main source of their travel information, followed by guidebooks as the most important source of printed materials (27%), while the Internet was used by 17% in 2002 (with 8% booking their travel or accommodation online), more than tour operator brochures and tourist board information (14%) [ATLAS Cultural Tourism Research Project, 2004]. American heritage and cultural travellers also mainly received word of mouth information (48%), but their use of the Internet to gather travel information is considerably higher at 40% [TIA/Smithsonian, 2003].

A minority of European cultural travellers book their transportation and accommodation in advance, and only 14.7% purchased all-inclusive packages. This finding is consistent with that of the TIA/Smithsonian study, which suggests that 56% plan trips at the last minute (one month or less) [TIA/Smithsonian, 2003]. A cultural visit is part of half of all holidays, included as part of visiting friends and relatives in 16.4% of cases, and part of cultural events activities in 12.3% of cases. 39.8% of cultural travellers consider their cultural trip as a city trip and about 30% consider it as a cultural holiday or a part of a touring holiday [ATLAS Cultural Tourism Research Project, 2004].

Daily newspapers (over 84%) and magazines (over 91%) may prove to be the best way to reach both Canadian and American culture and heritage tourists, followed by television programs (63%) viewed regularly and club/association memberships, e.g., AAA (59%)/CAA(45%) [TAMS Heritage Tourism Enthusiasts (2000-2001), Performing Arts Enthusiasts (2003), Visual

Arts Enthusiasts (2003) and Wine/Culinary Tourism Enthusiasts (2003) Reports].

Availability of information in as many different types of media as possible (before and during the visit) has been shown to be **the single most important factor in encouraging a higher level of interest and attendance** at artistic performances in Ireland, followed by venue and access. The research also highlighted the important roles of the travel trade and tour organizers in influencing attendance at live performances, disseminating information and selling tickets. 65% of group visitors to Ireland received tickets as part of the tour packages, and 35% made purchases at their own discretion. American group visitors tended to receive tickets as part of an inclusive package, while European group visitors tended to have purchased tickets as an option, for which the travel trade is the primary source. Europeans are more interested than Americans in promotions. 37% of Europeans (vs. 27% for Americans) are interested in a discount card and 26% (vs. 18%) in a pre-paid voucher [Tourism & The Performing Arts in Ireland, 2004].

Accommodation Preferences

North America

The types of accommodation used by the cultural and heritage travelers ranged widely; Canadians heritage tourists tended to divide their 19.6 million nights almost evenly between paid roofed lodging (34%) and the homes of friends and relatives (35%), while Americans tended to divide their 13.7 million nights between paid roofed lodging (7.6 million or 55%) and other forms of lodging including camp sites (1.9 million or 14%), the homes of friends and relatives (1.6 million or 12%) and other forms of accommodation (2.3 million or 17%) [TAMS Canadian Heritage Tourism Enthusiasts (2000) and US Heritage Tourism Enthusiasts (2001) Reports]. The rate of American culture travelers who stay in hotels, motels or B&Bs is higher than at 62%, (63.2 million trips), and compared to the average trip in the U.S., their trips are more likely to be seven nights or longer [TIA/Smithsonian, 2003].

Nearly all domestic cultural travel by Americans includes overnight travel, with an average of 5.2 nights. In Canada, Ontario reported that 23% of its overnight visitors in 2002 (11.5 million) participated in cultural activities [TIA/Smithsonian (2003) and Ontario's Overnight Cultural Tourist Market (2002)]. Compared to the average trip in the United States, historical/cultural trips are more likely to be seven nights or longer and include air travel, a rental car and a hotel stay [TIA/Smithsonian, 2003]

New Zealand

In New Zealand, small proportions of visitors stay in niche accommodation. For example, 4% of domestic visitors and 11% of international visitors stay at B&Bs or hotels in a heritage building. 2% of domestic visitors and 15% of international visitors enjoy farm and homestays. Experiencing local cuisine, shopping, and visiting museums and exhibitions of Maori history are most commonly pre-planned. The extent to which international and domestic visitors plan ahead in this regard varies considerably by product from 16% for a visit to an arts and craft market to 96% for a festival or event. International visitors are more likely to plan ahead than domestic visitors, particularly for museum visits and shopping for souvenirs [Tourism New Zealand's Demand for Cultural Tourism Research Report, 2003].

Europe

In Europe, culture travellers are more likely to be attracted to smaller establishments (2-3 stars) with good and comfortable quality and personalized service than to large luxury hotels. A growing trend shows that travellers are looking for 'character and charm' in their accommodation, thus properties that meet these needs, e.g., using local quality crafts or located in vernacular buildings, are becoming increasingly popular [European Cities and Capitals of Culture, 2004]. A recent WTO survey of German cultural travellers found that they expect local management of small accommodation businesses (50%), local cuisine with local ingredients (41.2%) and local hospitality (41.2%) [WTO in Travel and Tourism Analyst No.20, 2004].

However, the ATLAS survey suggests that cultural travellers whose main motivation is to visit exclusively cities for their cultural attractions, generally stay in hotels or with family and friends. These travellers have booked their accommodation along with the rest of their travel arrangements on the Internet or as part of a short break package holiday [ATLAS Cultural Tourism Research Project, 2004].

Image Challenges

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centers than its natural richness and opportunities for outdoor vacation activities. [Lang Research, TAMS Technical Appendix 10, 2001:16]

As a vacation destination, Canada is better known for its natural richness than for its culture and entertainment. Canadians tend to give higher ratings to Canada for many of its cultural and entertainment attributes than Americans, and were more likely to view Canada as having many historical sites, vibrant city life and places where one can experience “the good life”. However, Americans who have taken a trip to Ontario had a much more favorable impression of the province. Overall, attention must be paid to strengthening the image of Canada’s urban centers with the American cultural enthusiasts to promote Canada’s cultural attractions, events and ample opportunities for entertainment [TAMS Overview Reports, 2001].

Population Changes

Due to immigration, provinces and regions throughout Canada will grow at different rates. Ontario and British Columbia are experiencing the highest growth rates; Quebec and Atlantic Canada the lowest. Older people (over 55 years of age) will represent an increasingly sizeable proportion of the Canadian population (from 28% today to 42% by 2026). Market segments identified with older Canadians, including heritage, performing arts and wine/culinary, will grow at appreciably higher rates. As the population ages, the proportion of residents living in households with children will decline

[TAMS Overview Report, 2001].

Canadian residents born outside Canada will increase from about 21% today to 28% of the population by 2026. In contrast to outdoor activities that tend to draw almost exclusively Canadian-born travellers, performing arts enthusiasts are the least homogenous (75% Canadian born). Cultural activity-based segments are expected to have more members as there is a strong relationship between immigrants and Canadian-born adults in the national population (vs. in outdoor segments) [TAMS Overview Report, 2001].

Americans are also aging rapidly and are more highly concentrated in Tier III states, the furthest from the Canadian border. However, the number of Americans who will come to Canada over the next two decades is predicted to be somewhat higher at 31% than is growth of the American adult population as a whole (27%), due to their high degree of affluence. Significant growth is also anticipated for heritage, performing arts and wine/culinary segments, followed by visual arts enthusiasts, which mainly attract older Americans [TAMS Overview Report, 2001].

Other Trends

- The growth of cultural tourism is not just linked to cities and towns, but is also occurring in rural and more remote areas [Travel and Tourism Analyst No.20, 2004 and TAMS Overview Reports, 2001].
- Generic cultural tourism has recently been fragmented into niche segments with their own specific market trends and characteristics, e.g., gastronomic, wine and religious tourism. [Travel and Tourism Analyst No.20, 2004 and TAMS Overview Reports, 2001]. Some of these trends include a more energetic, educational and environment-oriented tourism [World Heritage Centre in Travel and Tourism Analyst No.20, 2004) or creative/self-improvement holidays whereby tourists seek personal cultural experiences, e.g., painting, cookery and language learning [Richards in Travel and Tourism Analyst No.20, 2004].
- A number cultural tourism activities are moving from niches to more mass market; For these, an attractive offering will be a combination of several of these activities carried out at a lower level of intensity and less focused on any one activity [Travel and Tourism Analyst No.20, 2004].

- In visiting heritage sites, there is growing interest in the everyday life stories of the past, not just the lives of famous historic figures, representing a broadening perspective of history [National Trust for Historic Preservation, 2004].
- The majority of the cultural visits are generated by a relatively small proportion of the total events, particularly 'blockbuster' and other signature events [European Cities and Capitals of Culture, 2004].
- Preservation efforts have become an important consideration in choosing a travel destination. 61% of American tourists surveyed believe that travel experiences are better when the destination is a well-preserved natural, historical, or cultural site. One in three American travelers are influenced by a travel company's efforts to preserve the environment, history, or culture of the destinations it visits [TIA and NGT, 2002]. This finding is also supported by research in Europe, where a stronger collaboration between cultural and tourism interests has emerged to manage the conflict between tourism and preservation. [Travel and Tourism Analyst No.20, 2004].

Future Implications for Culture and Heritage Tourism

Introduction

Based on the information reviewed, several patterns have been identified. In the past, cultural and heritage tourism was only available to the wealthy social elite with the purpose of searching for culture, education and pleasure. The rich and very affluent only represent small portion of the population. Since the 19th century, more of the middle class has access to participation in this type of tourism. Today, the general audience consists of the mid- to upper class, who are older and have high level of education and income.

PATTERNS		PRESENT	FUTURE
	'Classical Grand Tour'	Mass Market	Niche Market
Demographic	• Upper class • Elite only (very affluent) • Female	• Middle to upper class • High levels of income • High education • Older age groups • Female (equal split in some sub-segments) • Adult only household	• Lower to upper class • Most levels of income • Most levels of education • All age groups (shift to younger audiences) • Equal gender split • Household with children
Motivation	• Status; Culture, Education and Pleasure	• Leisure	• Pleasure, learning and experience • Hobbies and daily activities
Types of attractions	• High Culture	• Tangible	• Intangible "experience", e.g. festivals
Media Source	• Word of Mouth	• Word of mouth • Newspapers, magazines • Television • Internet	• Word of mouth • Internet
Wants and Needs	• Private accommodation • VFR	• Hotels • VFbR	• Smaller establishments • VFR • Shorter break, distance
Required offerings	• Available offerings were sufficient	• Accessibility, e.g., wheelchairs, language • Comfortable/deluxe	• Affordability • Dietary requirements • Language assistance • Convenience

Increasing Fragmentation

Due to the increase in attendance and types of demands, cultural and heritage tourism has become increasingly complex, with more and more sub-segments and niche markets forming. Along with the formation of these segments, the demographic characteristics of the market are shifting towards younger audiences, who also, despite their youth, have a high level of education and income, and a more equal gender split in some of the niche market, e.g., heritage tourism.

Changing Motivations

Longer working hours, the aging of baby boomers, population changes, and the role of education for Generations X and Y, are strongly impacting the psychographics of the cultural and heritage tourism segments. Trips tend to increasingly consist of shorter breaks (e.g., weekend trips and fewer overnights) at destinations closer to home (which increase domestic travel). The motivations and decisions regarding cultural and heritage tourism are increasingly based on pleasure, education/learning, experience, and enjoyment of a hobby or interests. In other words, the travelers' psychographic characteristics, e.g., values, daily interests, topics of education, etc., could prove to be highly related to their activities and preferences during travel.

A shift is occurring from larger to smaller accommodation establishments, and from standardized service (e.g., chain hotel) towards personalized service (e.g., B&B). The desire to experience local cultures, including aboriginal culture, meet local residents and taste local foods are also expressed. The increase in the domestic market suggests trends towards short-distance air travel, car rental, motor coach and train. The demand for group tours is mainly for long haul international travel. In this case, they prefer the package to include performance events or free-time options to attend performances.

There is a shift from tangible attractions, e.g., museums and monuments, towards intangible attractions and experiences, such as theatre and festivals. This trend requires commitment from travelers in terms of allocated time commitment, and purchasing tickets in advance. In addition, they require information prior to and during the trip about events and incentives in the form of discounts, sample performances, etc.

Jurisdictional Responses to These Trends

North America

- Formation of culture tourism initiatives group;
- Development of cultural tourism strategies;
- Prints of cultural/heritage map, guides, and other publications;
- Creation of itinerary planning aids, e.g., heritage attraction passports, cross promotions between sites, corridor proposals (e.g., by the Association of Heritage Industries);
- Establishment of a system of standards and certification for cultural and heritage tourism products;
- Formation of ecomuseums, e.g., in Newfoundland including woodworking in Amherst Cove;
- Education to residents and travelers regarding cultural preservation;
- Use of a product clustering system (creation of cultural/heritage programs in strategic locations across the province);
- Facilitation of cultural tourism roundtable (e.g., for both suppliers and customers);
- Demonstration and production of high quality crafts;
- Formation of arts, culture and heritage centers;
- Creation of package tour around arts and culture/heritage;
- Declaration of a Culture Tourism Week;
- Encouragement of dialogue/communication between culture and tourism industries (information sharing);
- Development of an endowment fund to support cultural programs and events;
- Further market research on various topics, e.g., hands-on learning tours at Elderhostels, etc.

New Zealand

- Development of the Tourism Strategy 2010 to guide the sustainable growth of the sector;
- Cultural tourism was specifically identified as a sector requiring further development to maximize its potential;

- Tourism New Zealand has identified the “interactive traveler” as the primary target for its international marketing activity.

Europe

- 21 cities have held the title of “European City of Culture (ECOC)” since 1995;
- The purpose of this program is to raise the international profile of the city and its region, to run a series of cultural activities and arts events, to attract travelers and to enhance community pride and self-confidence;
- Some cities have additional objectives, e.g., expanding the local audience for culture, making improvements to cultural infrastructure, developing relationships with other European cities and regions, promoting creativity and innovation and developing opportunities for local artists;
- This program has been successful and powerful in developing a new image for cities in terms of culture awareness;
- However, a significant drop in traveler numbers was usually noted in the following year (on average almost 4%) after strong growth during the ECOC year (on average up 12.7%);
- ECOC cities have performed much better than other European cities in 2000;
- Although city cultural tourism continues to be dominated by the established ‘cultural capitals’, there is evidence of a shift towards more trips to smaller destinations and new regions of Europe [European Cities and Capitals of Culture, 2004].

Glossary

Aboriginal Activities

- Aboriginal cultural experiences in a remote or rural location
- A powwow or other aboriginal celebration

[TAMS Aboriginal Tourism Report, 2001]

Emergent Vacation Interests

- Vacation activities and experiences which are more likely to be pursed within the next two years or in future travel activities than during the past two years

[TAMS Emergent Vacation Interests, 2002]

Hands-On Leaning While on Vacation

- People who exhibited an interest in participating in a hands-on learning experience (such as an archaeological dig, cooking course, learning another language) while on vacation during the past two years, as well as people who expressed an interest in this type of vacation experience.

[TAMS Hands-On Learning on Vacation, 2001]

Heritage Tourism Enthusiasts

- Canadians/Americans who have taken leisure trips in Canada and exhibit a particular interest in heritage-oriented activities when they travel. Their leisure trips (Canada and worldwide) in the past 2 years have included at least four of the following 11 heritage tourism activities:

1) Aboriginal cultural experiences in a rural setting
2) Pow Wow/other Aboriginal celebration
3) Aboriginal attractions
4) French Canadian cultural experiences
5) Carnivals and western theme events
6) Farmers' fairs or markets
7) Local festivals or fairs
8) Museums: Children's, general history, and science or technology
9) Historical replicas of cities/ towns
10) Historic sites
11) Own farms / harvesting

[TAMS US/Canada's Heritage Tourism Enthusiasts, 2000/2001]

Performing Arts Tourism Enthusiasts

- Canadians/Americans who have taken leisure trips in Canada and exhibit a particular interest in performing arts-oriented activities when they travel. Their leisure trips (Canada and worldwide) in the past 2 years have included at least three of the following activities on their travels:

1) Theatre or theatre festivals
2) music festivals
3) literary festivals or events
4) classical music concerts
5) jazz music concerts
6) opera
7) musical attractions
8) ballet or other dance

[TAMS US/Canada's Performing Arts Tourism Enthusiasts, 2003]

US Tier III	Nevada, Utah, Colorado, Kansas, Missouri, Kentucky, Tennessee, West Virginia, Delaware, New Jersey, Rhode Island, California, Arizona, New Mexico, Texas, Oklahoma, Arkansas, Louisiana, Mississippi, Alabama, Georgia, North Carolina, South Carolina, Florida, Hawaii. *[TAMS Overview Report, 2001]*
Visual Arts Tourism Enthusiasts	▪ Canadians/Americans who have taken leisure trips in Canada and exhibit a particular interest in the visual arts when they travel. Their leisure trips (Canada and worldwide) in the past 2 years have included at least one trip that focused on experiencing different cultures/ways of life or experiencing city life and at least two of the following visual arts tourism activities: 1) art galleries 2) browsing in arts and crafts studios 3) international film festivals *[TAMS US/Canada's Visual Arts Tourism Enthusiasts, 2003]*
Wine & Culinary Enthusiasts	▪ Canadians/Americans who have taken leisure trips in Canada and exhibit a particular interest in fine foods and wine. Their leisure trips (Canada and worldwide) in the past 2 years and have engaged in the any of the following wine & culinary activities: 1) Stay at cooking school, b) wine tasting school, and c) gourmet restaurant with accommodation on the premises 2) Any two of these activities: a) tour a region's wineries, b) go to wineries for day visits, and c) dine at internationally acclaimed restaurants. *[TAMS US/Canada's Wine and Culinary Enthusiasts, 2003]*

Appendices

No	Report Title	Author	Organisation	Date	Geography	Format
1	Travel Activities & Motivation Survey (TAMS) - Overview Report	Lang Research Inc.	Association of Canadian tourism ministries and organizations (Note 1)	Mar-01	Canada and Ontario	MR Report, 563 pgs.
2	TAMS Culture & Entertainment Segmentation Report	Lang Research Inc.	Association of Canadian tourism ministries and organizations (Note 1)	Jul-01	Canada and USA	MR Report, 258 pgs
3	TAMS Emergent Vacation Interests	Lang Research Inc.	Association of Canadian tourism ministries and organizations (Note 1)	Apr-02	Canada and USA	MR Report, 148 pgs
4	TAMS Touring Segmentation Report	Lang Research Inc.	Association of Canadian tourism ministries and organizations (Note 1)	Oct-01	Canada and USA	MR Report, 190 pgs
5	TAMS Wine & Cuisine Report	Lang Research Inc.	Association of Canadian tourism ministries and organizations (Note 1)	n.d. (2000-2001)	Canada and USA	MR Report, 36 pgs
6	TAMS Aboriginal Tourism Report	Lang Research Inc.	Association of Canadian tourism ministries and organizations (Note 1)	Sep-01	Canada and USA	MR Report, 37 pgs
7	TAMS Hands-On Learning on Vacation	Lang Research Inc.	Association of Canadian tourism ministries and organizations (Note 1)	Dec-01	North America	MR Report, 34 pgs
8	Activity-based Tourism Segments in Canada and the USA: An Overview TAMS	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2003	Canada	MR Report, 46 pgs
9	Canada's Heritage Tourism Enthusiasts: A Special Analysis of the Travel Activities and Motivation Survey (TAMS)	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2001	Canada	MR Report, 40 pgs

No	Report Title	Author	Organisation	Date	Geography	Format
10	US Heritage Tourism Enthusiasts: A Special Analysis of the Travel Activities and Motivation Survey (TAMS)	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2000	Canada	MR Report, 35 pgs
11	Canada's Visual Arts Tourism Enthusiast: A Special Analysis of the Travel Activities and Motivation Survey (TAMS)	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2003	Canada	MR Report, 39 pgs
12	U.S. Visual Arts Tourism Enthusiasts: A Special Analysis of the Travel Activities and Motivation Survey (TAMS)	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2003	USA	MR Report, 39 pgs
13	Canada's Performing Arts Tourism Enthusiasts: A Special Analysis of the Travel Activities and Motivation Survey (TAMS)	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2003	Canada	MR Report, 41 pgs
14	U.S. Performing Arts Tourism Enthusiasts: A Special Analysis of the Travel Activities and Motivation Survey (TAMS)	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2003	USA	MR Report, 39 pgs
15	Canadian Wine & Culinary Enthusiasts: A Special Analysis of the Travel Activities and Motivation Survey (TAMS)	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2003	Canada	MR Report, 41 pgs
16	U.S Wine and Culinary Enthusiasts: A Special Analysis of the Travel Activities and Motivation Survey (TAMS)	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2003	USA	MR Report, 37 pgs
17	Canada's Museum Tourism Enthusiasts - TAMS	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2004	Canada	MR Report, 42 pgs
18	U.S. Museum Tourism Enthusiasts - TAMS	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2004	U.S.A.	MR Report, 41 pgs

No	Report Title	Author	Organisation	Date	Geography	Format
19	Canada's Festival Tourism Enthusiasts - TAMS	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2004	Canada	MR Report, 41 pgs
20	U.S. Festival Tourism Enthusiasts - TAMS	Research Resolutions & Consulting Ltd.	CTC (Canadian Tourism Comission)	2004	U.S.A.	MR Report, 38 pgs
21	Canadian Cultural Tourists: Arts, Heritage & Ecotourist Profiles 1999-2000 Tourism Activities & Motivations Study (TAMS)	Research Resolutions & Consulting Ltd.	Department of Canadian Heritage	Mar-02	Canada	MR Report, 55 pgs
22	If the future were now… Impacts of Aging the Canadian Market on Tourism in Ontario: A Special Analysis of the TAMS	Research Resolutions & Consulting Ltd.	MTR (Ministry of Tourism and Recreation)	Jul-02	Ontario	MR Report, 27 pgs
23	The Opera Market of the Toronto-Hamilton-Oshawa Region, Now and Then	Research Resolutions & Consulting Ltd.	MTR (Ministry of Tourism and Recreation)	Nov-02	Toronto - Hamilton - Oshawa Region	MR Report, 19 pgs
24	The Live Theatre Market of the Toronto-Hamilton-Oshawa Region, Now and Then	Research Resolutions & Consulting Ltd.	MTR (Ministry of Tourism and Recreation)	Nov-02	Toronto - Hamilton - Oshawa Region	MR Report, 19 pgs
25	The Market for Live Theatre, Opera & Ballet in selected US States & Cities Now and Then	Research Resolutions & Consulting Ltd.	MTR (Ministry of Tourism and Recreation)	Mar-03	U.S.A.	MR Report, 47 pgs
26	The Historic/Cultural Traveller, 2003 Edition	TIA (Travel Industry Association of America)	TIA (Travel Industry Association) and Smithsonian Magazine	2003	USA	MR Report, 97 pgs
27	Tourism & The Performing Arts, Feasibility Study Phase 1	Sandra Kernan	Heritage Island/Theatre Forum	Nov-04	Ireland	MR Report, 12 pgs

No	Report Title	Author	Organisation	Date	Geography	Format
28	2002 Visitor Exit Survey: Report on the General Touring Segment of Visitors to the Northwest Territories	Investments & Economic Analysis, Resources, Wildlife & Eco Dev	GNWT (The Government of Northwest Territories)	2002	Northwest Territories	MR Report, 90 pgs
29	Ontario's Overnight Cultural Tourist Market, 2002 and Its Economic Impact in Ontario (in The Tourism Monographs No.43, June 2004)	MTR (Ministry of Tourism and Recreation)	MTR (Ministry of Tourism and Recreation)	2004	Ontario	MR Report, 19 pgs
30	Demand for Cultural Tourism, Summary of Research Findings	Colmar Brunton Social Research Agency	Tourism New Zealand	n.d.	New Zealand	MR Report, 27 pgs
31	Economic Impact of Cultural Tourists in Australia	Bureau of Tourism Research	Cultural Ministers Council, Statistics Working Group	Jan-04	Australia	MR Article, 7pgs
32	City Tourism & Culture - The European Experience	LAgroup Leisure & Arts Consulting and Interacts	World Tourism Organization (WTO) and European Travel Commission (ETC)	Feb-05	Europe	MR Report, 137 pgs
33	Heritage and Culture -Strategic Marketing Plan (2000-2002) (including Market/Performance Research Review).	Tourism Development International	Bord Failte	Apr-99	Ireland	Final Draft, 30 pgs
34	The Canadian Culinary Tourists: How well do we know them?	Elena Ignatov	University of Waterloo	2003	Canada	Thesis, 152 pgs
35	Understanding the composition of the performing arts audiences in Canada	Anda Carabineanu	University of Waterloo	2002	Canada	Thesis, 192 pgs

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36	Cultural Tourism Economic Impact Study (* the report includes trends and definition)	Grant Thornton	The Langley Cultural Tourism Committee	Sep-03	Langley, Canada	MR Report, 40 pgs
37	Cultural Tourism Statistics	Cultural Ministers Council DCITA	Cultural Ministers Council	Aug-01	Australia	MR Report, 49 pgs
38	Consumer Demand and Operator Support for Socially and Environmentally Responsible Tourism	Zoë Chafe	Center on Ecotourism and Sustainable Development (CESD), The International Ecotourism Society (TIES)	Jan-04	Worldwide	Compilations of Consumer Demand Report, 9 pgs
39	MEXICANS as International Travelers: Action-oriented information for marketing decisions, Consumer and Trade Research	MENLO Consulting Group Inc. (MCG)	Canadian Tourism Comission (CTC)	2003	Mexico	MR Report, 209 pgs
40	Tourism and Parks, Acadian Coastal Drive Consumer Profile	New Brunswick, Department of Tourism and Parks	New Brunswick, Department of Tourism and Parks	n.d.	New Brunswick	MR Report, 21 pgs
41	Cultural and Heritage Tourism - International Travel & Tourism Analyst, No. 20, 2004	Mintel International Group Ltd	Mainly: Atlas and ECOC	Nov-04	International	Journal, 73 pgs.
42	Ottawa Festival, Visitor Impact Study	Research and Information Department, Ottawa Tourism	Ottawa Tourism	Nov-03	Ottawa	Compendium Report, 40 pgs
43	Prince Edwards Islands, 2004 Marketing Plan	Prince Edwards Island Tourism, Prince Edwards Island Tourism Marketing Authorities	Prince Edwards Island Tourism, Prince Edwards Island Tourism Marketing Authorities	2004	Prince Edwards Island	Marketing Plan, 97 pgs
44	A Profile of Visitors To British Columbia's Okanagan Valley: Focus on cultural tourists	Research Services, Tourism British Columbia	Tourism British Columbia	Jan-04	Okanagan, BC	MR Report, 29 pgs
45	TAMS Targeting Travel Innovators	Ontario Ministry of Tourism and Recreation	Ontario Ministry of Tourism and Recreation	Jul-02	Canada and USA	MR Report, 37 pgs

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46	Share your Heritage	Heritage Tourism Porgram of the National Trust for Hisptirc Preservation	National Trust for Historic Preparation	n.d.	U.S.A.	MR Article, 2 pgs
47	Cultural Tourism Study	Cultural Tourism Study, Research Unit Tourism Victoria	Tourism Victoria	2004	Victoria, Australia	MR Article, 5pgs
48	2002/2003 Travel/Tourism Indicators for Newfoundland & Labrador	Strategic Planning and Policy Division, Department of Tourism, Culture and Recreation	Department of Tourism, Culture and Recreation, Newfoundland and Labrador	Mar-04	Newfoundland and Labrador	MR Report, 302 pgs
49	Nova Scotia Learning Development Vacation Guide	The Economic Planning Group of Canada	Nova Scotia Economic Development and Tourism	Jan-98	Nova Scotia	MR Reports, 25 pgs
50	Nova Scotia Cultural Tourism - Final Report	The ARA Consulting Group Inc. and LORD Cultural Resources Planning and Management Inc.	Tourism Nova Scotia	Apr-97	Nova Scotia	MR Report, 126 pgs
51	Tourism and The Performing Arts	David Gilbert and Martine Lizotte, Travel & Tourism Intelligence No.1, 1998	English Tourist Board (ETB) and British Tourist Authority (BTA)	1998	UK	Journal Article, 15 pgs
52	Aboriginal Tourism in North America	Helga Loverseed, Travel & Tourism Intelligence No.6, 1998	CTC, TIA and WTO	1998	North America	Journal Article, 13 pgs
53	Cultural Tourism Strategy for Wales	Wales Tourist Board	Wales Tourist Board	2003	Wales	Strategy Plan, 107 pgs

Note 1: Association of Canadian tourism ministries and organizations consists of: 1)Atlantic Tourism Partnership, 2) Canadian Tourism Commission, 3) Department of Canadian Heritage, 4) Greater Toronto Hotel Association, 5) Manitoba Ministry of Industry, Trade & Tourism, 6) Northern Ontario Heritage Fund, 7) Ontario Casino Corporation, 8) Ontario Ministry of Agriculture, Food and Rural Affairs, 9) Ontario Ministry of Tourism, Culture & Recreation, 10) Ontario Tourism Marketing Partnership, 11) Parks Canada, 12) Saskatchewan Tourism Authority, 13) Tourism B.C., 14) Tourism Toronto and 15) Yukon Government Department of Tourism.

No	Report Title	Author	Organisation	Date	Geography	Format
1	Developing a Strategy for Cultural Tourism: Increasing the cultural dimensions of the New Zealand Visitor's Experience	n.n.	n.n.	Jun-00	New Zealand	Draft Discussion Paper
2	Preservation Pays, Heritage Tourism: Pride and Profit	Culture and Tourism Statistic Canada	Culture and Tourism Statistic Canada	n.d.	Canada	Slideshow, 5pgs
3	Cultural Tourism, http://www.nasaa-arts.org/artworks/ct_contents.shtml	NAASA (National Assembly of State Arts Agency)	NAASA (National Assembly of State Arts Agency)	Current	USA	Definition Website only
4	Beyond Economics: Developing Indicators of the Social Effects of Culture	Dick Stanley, SRA (Strategic Research and Analysis)	SRA (Strategic Research and Analysis)	Jun-01	Canada	Academic Report on Definition only, 14 pgs
5	Packaging the Potential, Sharing Manitoba's Culture with the World… a collaborative approach to maximize the potential of cultural and heritage tourism	Manitoba Culture, Heritage and Tourism	Manitoba Culture, Heritage and Tourism	2004	Manitoba	Strategy Report, 18 pgs
6	Packaging the Potential, Canada: Destination Culture - A Symposium on Cultural and Heritage Tourism Products Montreal, May 1st, 2004 Proceedings and Final Report	CTC (Canadian Tourism Commission)	CTC (Canadian Tourism Comission)	2004	Canada	Strategy Report, 30 pgs
7	Packaging the Potential, A five-year Business Strategy for Cultural and Heritage Tourism in Canada	CTC (Canadian Tourism Commission)	CTC (Canadian Tourism Comission)	Dec-99	Canada	Strategy Report, 22 pgs
8	Packaging the Potential, Cultural Tourism at the Bienvenue Quebec 2002 Marketplace: An Innovative Networking Event 1) Report, 2) An Overview, 3) The Orientation Survey	APAQ (Quebec Bus Owners' Association)	APAQ (QC Bus Owners Assoc), MCCQ (QC Dept of Culture & Comm.), Tourisme Quebec	2002	Quebec	Strategy, Definition and Supply Report, 55 pgs
9	Toward a Cultural Strategy for the Government of Prince Edward Island, Final Report	MacArthurGroup Inc.	Gov of PEI's Inter-Depart Cultural Co-ordinating Comm (ID3C)	Dec-03	PEI	Strategy Report, 45 pgs

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10	World Decade for Cultural Development: Tourism, Culture and Development in the Arab Region, http://unesdoc.unesco.org/images/0011/001183/118316eo.pdf	M. Mohamed Berriane	UNESCO	1999	Arab Region	Report
11	Industry Strategies: Tourism Industry Strategy, National Aboriginal and Torres Strait Islander	ATSIC	ATSIC	n.d.	Australia	Website
12	Travel Manitoba: Trade Show Survey Results from Trade Show in a primary market to Manitoba	Manitoba Culture, Heritage and Tourism	Manitoba Culture, Heritage and Tourism	n.d.	Manitoba	Quantitative Data Results, 14 pgs
13	Tourism in Focus: A strategy to target future success (2003 - 2005)	New Brunswick Tourism and Parks	New Brunswick Tourism and Parks	Mar-03	New Brunswick	Report
14	New Brunswick Tourism Development Guidelines	New Brunswick Tourism and Parks	New Brunswick Tourism and Parks	May-04	New Brunswick	Report
15	A Special Place, A Special People, The Future for Newfoundland and Labrador Tourism - Main Report	The Economic Planning Group of Canada and D.W. Knight Associates	Hospitality Newfoundland and Labrador	Mar-04	New Foundland and Labrador	Report
16	A searchable database of reports for tourism research at Tourism Research Council New Zealand, http://www.trcnz.govt.nz/Research+Index/	Tourism Resarch Council New Zealand	Tourism Resarch Council New Zealand	Current	New Zealand	Website
17	Ontario Culture - CTS/ITS 2003 (Harmonized) - Ontario Statisical Data	n.n.	n.n.	2003	Ontario	Statistical Data only, 76 pgs
18	Ontario Culture - CTS/ITS 2002 (Harmonized) - Ontario Statisical Data	n.n.	n.n.	2002	Ontario	Statistical Data only, 76 pgs

No	Report Title	Author	Organisation	Date	Geography	Format
19	Museums and tourism: culture and consumption	Yani Herreman	UNESCO	1998	Worldwide	Article
20	Round Table of Experts on Culture, Tourism, Development: Crucial Issues for the XXIst Century; Paris; 1997;	UNESCO/AIEST Annals of Tourism Research	UNESCO	1997	Worldwide	Report
21	Cultural Heritage and Tourism Development	Luigi Cabrini, WTO (World Tourism Organisation)	WTO (World Tourism Organisation)	11-13 Sept 2002	Worldwide	Speech, 4 pgs
22	Cultural Tourism: Opportunities and Challenges	Luigi Cabrini, WTO (World Tourism Organisation)	WTO (World Tourism Organisation)	17-Jan-03	Worldwide	Speech, 5 pgs
23	Concept of a more effective care for cultural monuments of the Czech Republic until 2005	Ministry of Culture of the Czech Republic	Ministry of Culture of the Czech Republic	1999	Czech Republic	Plan Report, 92 pgs
24	Denmark in the Culture and Experience Economy - 5 new steps The Danish growth strategy	Government of Denmark	Government of Denmark	Sep-03	Denmark	Report, 66 pgs
25	2005 NOVA SCOTIA TOURISM PLAN, Deliver the experience This is Nova Scotia Canada's Seacoast	Minister of Tourism, Culture & Heritage	Minister of Tourism, Culture & Heritage	2005	Nova Scotia	Tourism Plan, 28 pgs
26	Heritage Planning Guide: for Natural and Cultural Heritage Projects in Newfoundland & Labrador	The Association of Heritage Industries of Newfoundland & Labrador	The Association of Heritage Industries of Newfoundland & Labrador	Apr-03	Newfoundland & Labrador	Guide, 155 pgs
27	Cultural Policy Recommendations	Association of Heritage Industries	Association of Heritage Industries	Apr-03	Newfoundland & Labrador	Report, 16 pgs

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28	Visitor Profile 1994 Yukon Visit or Exit Survey, Visitor Profiles Report Executive Summary Yukon Visitors	Tourism Industry Resource Centre	Tourism Industry Resource Centre	1994	Yukon	Visitor Profiles Report, 20 pgs
29	The Okanagan Cultural Corridor Strategic Plan, For Cultural Sector and Tourism Product Development, Strategic Plan	Don Elzer	Bearfoot Canada	Apr-04	Okanagan	Strategic Plan, 87 pgs
30	Building Better Communities A Discussion Paper on the Regional and Zone Delivery Model in Saskatchewan	The Building Better Communities Committee of the Saskatchewan Parks and Recreation Association, Sask Sport Inc. and SaskCulture Inc.	The Building Better Communities Committee of the Saskatchewan Parks and Recreation Association, Sask Sport Inc. and SaskCulture Inc.	Mar-05	Saskatchewan	Discussion Paper, 29 pgs
31	Programs and Services For Use In Sport, Culture, and Recreation	Sport and Recreation Branch, Saskatchewan Culture, Youth and Recreation	Sport and Recreation Branch, Saskatchewan Culture, Youth and Recreation	Jan-05	Saskatchewan	Discussion Paper, 39 pgs
32	2005 - 2006 Provincial Budget Performance Plan, Annual Report 2003-2004	Saskatachewan Culture, Youth and Recreation	Saskatachewan Culture, Youth and Recreation	2005	Saskatchewan	Budget Performance Plan, 24 pgs
33	A Vision for the Arts in the NWT	NWT Arts Strategy Advisory Panel	NWT Arts Strategy Advisory Panel	Dec-02	NWT	Recommendation Report, 51 pgs
34	The GNWT Response to "A Vision for the Arts in the NWT"	Government of the Northwest Territories	Government of the Northwest Territories	Jul-03	NWT	Action Plan, 29 pgs
35	Nova Scotia's Cultural Policy	Nova Scotia Education and Culture Department	Nova Scotia Education and Culture Department	n.d.	Nova Scotia	Policy Statement, 2 pgs
36	The Nova Scotia Culture Sector Strategy, Culture in the New Millenium, Planning Our Future	Fourth Wave Strategic Management Associates	Sector Strategy Management Committee	30-Sep-99	Nova Scotia	Strategy Report, 36 pgs
37	Cultural Consumption and Participation	John A. Foote	Strategic Research and Analysis (SRA), Strategic Policy and Research, Department of Canadian Heritage	Jun-02	Canada	MR Report, 12 pgs

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38	A Cultural Policy for Newfoundland and Labrador	Department of Tourism, Culture and Recreation Government of Newfoundland & Labrador	Department of Tourism, Culture and Recreation Government of Newfoundland & Labrador	Nov-02	Newfoundland & Labrador	Policy Report, 12 pgs
39	Strategic Marketing Plan 2004-2008	Newfoundland and Labrador Tourism Marketing Council (NLTMC)	Newfoundland and Labrador Tourism Marketing Council (NLTMC)	Sep-04	Newfoundland & Labrador	Marketing Plan, 13 pgs
40	2003-2004 Annual Report	Culture and Sports Secretariat	Culture and Sports Secretariat	Nov-02	New Brunswick	Annual Report, 27 pgs
41	Nova Scotia Integrated Tourism Plan 2002	Nova Scotia Tourism Partnership Council	Nova Scotia Tourism Partnership Council	2002	Nova Scotia	Tourism Plan, 16 pgs
42	Profile of Culture Activities, In Nova Scotia Culture Counts – Counting Culture, Data Tables Part I	n.n.	Culture Statistics Program	2001	Nova Scotia	Data Tables, 40 pgs
43	Profile of Culture Activities, In Nova Scotia Culture Counts – Counting Culture, Culture Statistics Program	Michel G. Durand, Culture Statistics Program	Culture Statistics Program	Dec-03	Nova Scotia	Report, 74 pgs
44	Nova Scotia Learning Development Vacation Guide	The Economic Planning Group of Canada	Nova Scotia Economic Development and Tourism	Jan-98	Nova Scotia	MR Reports, 33 pgs
45	Cultural Consumption and Participation	John A. Foote, Strategic Research and Analysis (SRA)	Department of Canadian Heritage	Jun-02	Canada	Strategic Research Reports, 11 pgs
46	Information Management in Cultural Tourism: An Empirical Model	New Zealand Tourism Research Institute	New Zealand Tourism Research Institute	14-Mar-00	New Zealand	Media Release, 33 pgs
47	The Okanagan Cultural Corridor, Strategic Plan For Cultural Sector and Tourism Product Development	Don Elzer, Bearfoot Canada	Canadian Tourism Commission	Apr-04	Okanagan	Strategic Plan, 87 pgs
48	Cultural Tourism In Europe	Greg Richards, Cab International	N/A	1996	Europe	Book, 330 pgs
49	The Market for Cultural Tourism in Europe	Bywater, M, Travel & Tourism Analyst, no. 6	Economic Intelligence Unit	1993	Europe	Journal

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50	L'évolution de la demande en matiere de tourisme culturel	Roederer, B, Espaces no. 37	N/A	Juin 1994	France	Journal
51	Évolution et diversité des clienteles du domaine des arts au Canada.	Colbert, Fh., Action Canada-France, 3 e trimestre	N/A	1996	Canada	Journal
52	Profile of Travelers Who Participate in Historic and Cultural Activities (Results from Travelscope Survey)	Travel Industry Association of America.	Travel Industry Association of America.	August 1997	???	Report
53	Canadian Travel to the United States 1996	U.S. Department of Commerce.	U.S. Department of Commerce.	May-98	USA	Report
54	Travel Forecast 2000: Twenty-One Questions for the 21st Century	CTRI	CTRI	Jul-97	Canada	Report
55	International Trade Adminstration's Tourism Industries Office quoted in American Association of Museums.	Partners in Tourism, Culture and Commerce	International Trade Adminstration's Tourism Industries Office	1997	USA	Report
56	The Place of the Entertainment Sector (Musicals) and its Influence Within the Tourism Industry, Degree of MSc in Tourism Marketing	Lizotte, M.	University of Surrey	1997	UK	thesis
57	Vendre le tourisme culturel. Guide méthodologique, Éditions Économica	Barré Josquin	France	1995	France	Book
58	Tourisme et culture à Montréal: une nouvelle synergie	Bellerose, Pierre & Beauregard, Bettie	Ministère de la culture et des communications	1996	Québec	Report
59	Les retombées économiques du secteur musical en Estrie	Boilard, Diane	Conseil régional de développementde l'Estrie	2000	Québec	Report
60	Culture et tourisme en v ille: une affaire de créativité	Culture et Communications	Ministère de la culture et des communications	1999	Québec	Conference Report
61	Etude sur le potentiel touristique du patrimoine religieux montréalais	Office des congrès et du tourisme du Grand Montréal	Ministère de la culture et des communications	1995	Québec	Report
62	Tourisme culturel: la danse - fiche marketing	Office des congrès et du tourisme du Grand Montréal	Recherche et développement, Tourisme Montréal	1998	Québec	Report

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63	Tourisme culturel: la musique classique et l'opéra - fiche marketing	Office des congrès et du tourisme du Grand Montréal	Recherche et développement, Tourisme Montréal	1998	Québec	Report
64	Tourisme culturel: le théâtre - fiche marketing	Office des congrès et du tourisme du Grand Montréal	Recherche et développement, Tourisme Montréal	1998	Québec	Report
65	Tourisme culturel: les musées et expositions - fiche marketing	Office des congrès et du tourisme du Grand Montréal	Recherche et développement, Tourisme Montréal	1998	Québec	Report
66	Le tourisme dans Charlevoix: analyze du concept de la route des saveurs	Bouchard, Josée	Université de Laval, Département d'aménagement	1997	Québec	Report
67	Profil de la clientèle touristique pour les produits autochtones québécois, selon le type d'offre	Club du produit Tourisme autochtone	Canadian Tourism Commission	2000	Québec	Report
68	Étude de positionnement touristique des quatre grands festivals d'été de Montréal	Chaire de Tourisme	Université de Québec à Montréal	?	Québec	Report
69	Aboriginal Tourism in North America	Helga Loverseed, Travel & Tourism Intelligence No.6, 1998	CTC, TIA and WTO	1998	North America	Journal Article, 13 pgs
70	Etude de recherche sur le marché intérieur du tourisme: Québec	Canadian Tourism Commission		1996	Quebec	Report