

CANADIAN TRAVEL MARKET

Visiting Fairs and Festivals While on Trips Of One or More Nights

A Profile Report

November 4, 2007

Prepared by Lang Research Inc. on behalf of:

Ontario Ministry of Tourism, Ontario Tourism Marketing Partnership Corporation, Quebec Ministry of Tourism,
Travel Manitoba, Canadian Tourism Commission, Tourism Saskatchewan, Atlantic Canada Tourism
Partnership, Alberta Tourism, Parks, Recreation and Culture, Department of Canadian Heritage, Tourism British
Columbia, Parks Canada Agency, Government of Yukon, Government of Northwest Territories



Visiting Fairs and Festivals While on Trips

Executive Summary

Over the last two years, 28.0% (6,949,250) of adult Canadians visited a fair or festival while on an out-of-town, overnight trip of one or more nights. Farmers' markets or country fairs (15.0%) were visited most often, followed by fireworks displays (11.8%), exhibitions or fairs (8.6%), carnivals (5.1%), food and drink festivals (4.1%) and ethnic festivals (3.2%). Attending fairs and festivals while on trips was the 4th most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travelers in the past two years. Of those who visited a fair or festival, 28.3% (1,964,877) reported that this activity was the main reason for taking at least one trip in the past two years.

Relative to the average Canadian Pleasure Traveler, Fair and Festival Visitors are slightly more likely to be female (53.1%) and younger. The majority are married and their level of education and household incomes (\$74,722) are slightly above-average. They are also slightly over-represented in Saskatchewan, British Columbia and Ontario.

Fair and Festival Visitors are less frequent travelers than the majority of the other culture and entertainment activity types. Fair and Festival Visitors were the 13th most likely of the 21 culture and entertainment activity types to have taken a trip within their own province or region (90.0%), the 17th most likely to have traveled to an adjacent province or region (53.1%) and the 15th most likely to have visited a non-adjacent province or region (36.5%) in the past two years. Their out-of-country travel is also below-average. They were the 18th most likely to have visited the United States (56.5%), the 15th most likely to have visited Mexico (14.5%), the 19th most likely to have taken a trip to the Caribbean (15.9%) and the 13th most likely to have traveled overseas (27.1%).

Fair and Festival Visitors were very likely to attend other types of exhibitions and festivals while on trips (e.g., theme parks & exhibits; musical concerts, festivals & attractions; science & technology exhibits; equestrian & western events; comedy festivals & clubs; literary & film festivals). They were also very active in outdoor activities while on trips and especially physically strenuous activities (e.g., exercising & jogging, cycling). This activity segment was also observed to take a wide variety of tours while traveling. They prefer vacations that offer novelty and learning opportunities as well as a chance to renew personal connections with their friends.

Relative to the other 21 culture and entertainment activity types, those who attended fairs and festivals are below-average users of the Internet to plan (66.5%) and book (43.1%) travel. However, they are above-average consumers of travel-related media and may also be effectively targeted through house and home-related media (e.g., house & home websites; home & garden television; crafts, antiques & collectibles magazines).

Visiting Fairs & Festivals While on Trips

Market Incidence

Over the last two years, 28.0% (6,949,250) of adult Canadians visited fairs or festivals while on an out-of-town, overnight trip of one or more nights. Farmers' markets or country fairs (15.0%) were visited most often while on trips followed by fireworks displays (11.8%), exhibitions or fairs (8.6%), carnivals (5.1%), food and drink festivals (4.1%), and ethnic festivals (3.2%). Attending a fair or festival while on a trip was the fourth most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travelers in the past two years.

Of those who visited fairs and festivals, 28.3% (1,964,877) reported that this activity was the main reason for taking at least one trip during the past two years. Exhibitions or fairs, carnivals and ethnic festivals were more likely than food and drink festivals, fireworks displays and farmers' markets or country fairs to be reported as the main reason for taking at least one trip in the last two years.

Fig. 1 Incidence of Visiting Fairs & Festivals While on Trips¹

	Number of Fairs and Festivals Visitors ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	6,949,250	1,964,877	18,439,508	24,776,103
Fairs & Festivals (All Activities)	6,949,250	28.3%	37.7%	28.0%
Farmers' markets or country fairs	3,717,280	19.3%	20.2%	15.0%
Firework displays	2,913,223	20.3%	15.8%	11.8%
Exhibitions or fairs	2,138,615	31.9%	11.6%	8.6%
Carnivals	1,271,967	33.6%	6.9%	5.1%
Food & drink festivals	1,027,633	23.9%	5.6%	4.1%
Ethnic festivals	795,263	30.2%	4.3%	3.2%
Participated in all six activities	39,178	25.4%	0.2%	0.2%

- 1 - "Trips" are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - "Fair and Festival Visitors" are defined as individuals who visited a fair or festival while on an out-of-town trip of one or more nights during the past two years and who took at least one out-of-town pleasure trip of one or more nights during the past two years. This column reports the number of individuals who participated in the activity on at least one trip during the last two years.
- 3 - This column reports the percent who participated in each activity who stated that the activity was the main reason for taking at least one trip during the past two years.
- 4 - "Pleasure Travelers" are defined as individuals who have taken at least one out-of-town pleasure trip of one or more nights in the last two years. This column reports the percent of Pleasure Travelers who participated in each activity on at least one trip during the last two years.
- 5 - This column reports the percent of the Total Canadian Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region

Fair and Festival Visitors are slightly over-represented in Saskatchewan, British Columbia and Ontario. They are least likely to live in Quebec.

Fig. 2 Geographic Distribution of Those Who Visited Fairs & Festivals While on Trips

	Total Population	Estimated Number Who Visited Fairs & Festivals on a Trip	Percent of Pleasure Travelers in Region Who Visited Fairs & Festivals on a Trip	Percent of Total Regional Population Who Visited Fairs & Festivals on a Trip
Canada	24,776,103	6,949,250	37.7%	28.0%
Atlantic Provinces	1,822,494	470,193	37.1%	25.8%
Quebec	5,940,869	1,353,132	32.2%	22.8%
Ontario	9,671,592	2,830,800	39.5%	29.3%
Manitoba	843,107	217,423	36.5%	25.8%
Saskatchewan	706,325	223,685	41.3%	31.7%
Alberta	2,465,540	757,631	37.8%	30.7%
British Columbia	3,326,176	1,096,386	41.2%	33.0%

Demographic Profile

Relative to the average Canadian Pleasure Traveler, Fair and Festival Visitors are slightly more likely to be female (53.1%) and over-represented among those 18 to 24 years of age. This activity type is comparable to the average Canadian Pleasure Traveler in terms of marital and parental status. Their level of education and household income (\$74,722) are just slightly above-average.

Fig. 3 Demographic Profile of Fair and Festival Visitors Relative to All Canadian Pleasure Travelers

Attribute	Size of Market	Fair and Festival Visitors	Did Not Visit Fairs or Festivals ¹	Pleasure Travelers	Index ²
		6,949,250	11,490,259	18,439,508	100
Gender	Male	46.5%	50.2%	48.8%	95
	Female	53.5%	49.8%	51.2%	105
Age of Respondent	18 to 24	14.6%	11.7%	12.8%	114
	25 to 34	20.0%	18.8%	19.3%	104
	35 to 44	21.1%	20.2%	20.5%	103
	45 to 54	19.5%	20.8%	20.3%	96
	55 to 64	13.9%	14.3%	14.1%	98
	65 Plus	10.9%	14.1%	12.9%	84
Average Age		43.3	45.3	44.5	N/A
Marital Status	Not married	33.8%	31.3%	32.2%	105
	Married	66.2%	68.7%	67.8%	98
Parental Status	No children under 18	71.3%	71.0%	71.1%	100
	Children under 18	28.7%	29.0%	28.9%	99
Education	High school or less	33.8%	37.7%	36.2%	93
	Some post-secondary	12.0%	10.7%	11.2%	107
	Post-secondary diploma/certificate	21.9%	21.9%	21.9%	100
	University degree	32.4%	29.7%	30.7%	105
Household Income	Under \$20,000	5.0%	6.1%	5.7%	88
	\$20,000 to \$39,999	14.2%	14.7%	14.5%	98
	\$40,000 to \$59,999	16.8%	16.4%	16.5%	102
	\$60,000 to \$79,999	15.0%	15.4%	15.2%	99
	\$80,000 to \$99,999	11.5%	12.6%	12.2%	94
	\$100,000 or more	25.3%	21.3%	22.8%	111
	Not stated	12.2%	13.5%	13.0%	94
Average Household Income		\$74,722	\$71,667	\$72,829	N/A

- 1 - Those who "Did Not Visit Fairs or Festivals" are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years but did not visit a fair or festival on any trip. The number of Fair and Festival Visitors and non-visitors equals the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Fair and Festival Visitors in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Fair and Festival Visitors are over or under-represented relative to the average Pleasure Traveler. An index of 100 means the percent participating in the activity is the same as that of the average Canadian Pleasure Traveler. Index values over 100 indicate that those participating in the activity are over-represented relative to the average Canadian Pleasure Traveler. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average Canadian Pleasure Traveler.

Travel Activity (During Last Two Years)

Fair and Festival Visitors are less frequent travelers than the majority of the other culture and entertainment activity types. They were the 13th most likely of the 21 culture and entertainment activity types to have taken a trip within their own province or region (90.0%), the 17th most likely to have traveled to an adjacent province or region (53.1%) and the 15th most likely to have visited a non-adjacent province or region (36.5%) in the past two years. Ontario (59.1%), Quebec (39.7%) and British Columbia (34.8%) were the most common destination visited.

The out-of-country travel activity of those who attended fairs and festivals is also below-average. They were the 18th most likely to have visited the United States (56.5%), the 15th most likely to have visited Mexico (14.5%), the 19th most likely to have taken a trip to the Caribbean (15.9%) and the 13th most likely to have traveled overseas (27.1%).

Fig. 4 Percent Traveling Within Canada and to Other Destinations during Past Two Years

	Fair and Festival Visitors	Did Not Visit Fairs or Festivals	Pleasure Travelers	Index
Size of Market	6,949,250	11,490,259	18,439,508	100
Canada	97.1%	93.3%	94.8%	102
Took a trip within own province / region	90.0%	83.3%	85.9%	105
Took a trip to an adjacent province / region	53.1%	45.8%	48.6%	109
Took a trip to non-adjacent province / region	36.5%	28.4%	31.4%	116
Newfoundland and Labrador	4.6%	4.1%	4.3%	107
Prince Edward Island	8.9%	6.1%	7.2%	124
New Brunswick	14.0%	10.5%	11.8%	119
Nova Scotia	14.8%	11.4%	12.7%	117
Quebec	39.7%	38.5%	38.9%	102
Ontario	59.1%	50.2%	53.5%	110
Manitoba	10.8%	8.2%	9.2%	118
Saskatchewan	14.0%	9.8%	11.4%	123
Alberta	29.6%	23.6%	25.8%	115
British Columbia	34.8%	28.1%	30.6%	114
Yukon	1.4%	0.7%	1.0%	143
Northwest Territories	0.9%	0.5%	0.7%	129
Nunavut	0.3%	0.3%	0.3%	116
United States	56.5%	47.2%	50.7%	111
Mexico	14.5%	11.1%	12.4%	117
Caribbean	15.9%	15.4%	15.6%	102
All other destinations	27.1%	21.6%	23.6%	114

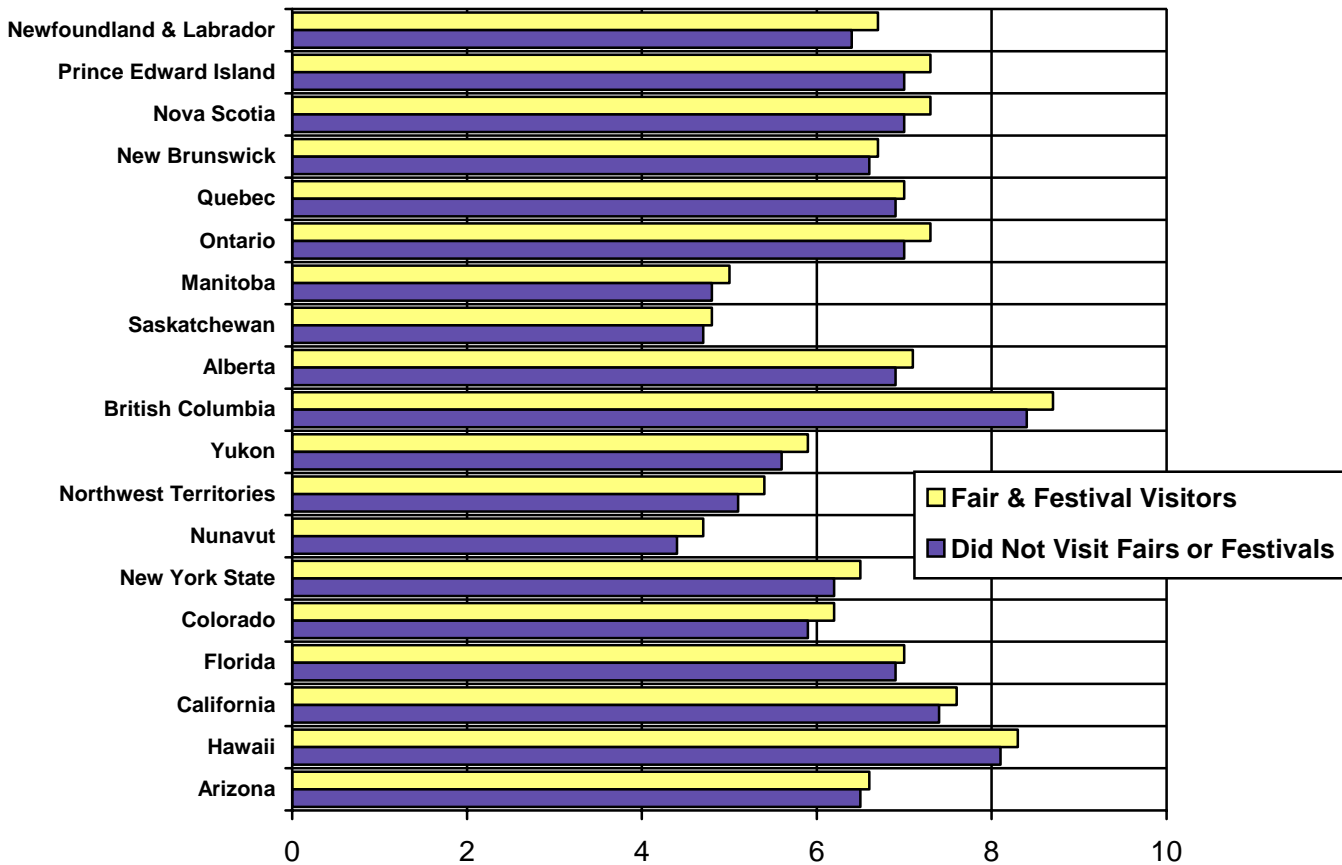
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

The respondents were asked to rate the appeal of each of Canada's provinces and territories on a ten-point appeal scale where "10" is "Very Appealing" and "1" is "Very Unappealing". They were also asked to rate selected U.S. states (New York State, Colorado, Florida, California, Hawaii and Arizona) to provide a frame of reference.

Fair and Festival Visitors have a more positive impression of most Canadian destinations than do other Canadian Pleasure Travelers. British Columbia (8.7) was rated as the most appealing among all destinations. The next most appealing provinces were Nova Scotia (7.3), Prince Edward Island (7.3) and Ontario (7.3).

The appeal ratings of Fair and Festival Visitors were also slightly higher than those of other Canadian Pleasure Travelers for all U.S. reference states. Hawaii (8.3) and California (7.6) received the highest ratings from this segment.

Fig. 5 Overall Appeal Ratings of Provinces, Territories and Selected U.S. States on a 10-Point Appeal Rating Scale (Higher Scores=More Appealing)



Other Culture and Entertainment Activities Pursued While on Trips

Fair and Festival Visitors were more active than the average Canadian Pleasure Traveler in culture and entertainment pursuits while on trips. The majority went shopping and dining, visited historical sites, museums and galleries, visited theme parks and exhibits and attended musical concerts, festivals and attractions while on trips. Relative to the average Canadian Pleasure Traveler, Fair and Festival Visitors were especially likely to have visited other exhibitions and festivals (e.g., garden theme attractions, science and technology exhibits, literary and film festivals, comedy festivals and clubs, musical concerts, festivals and attractions) and to have taken part in educational, participatory activities (e.g., agro-tourism, aboriginal cultural experiences, participatory historical activities) while traveling. They are also more likely to have attended live art performances (e.g., high art performances, live theatre) and sporting events (e.g., equestrian and western events, amateur tournaments, professional sporting events) while on trips during the past two years.

Fig. 6 Other Culture and Entertainment Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Culture & Entertainment Activity)

	Fair and Festival Visitors	Did Not Visit Fairs or Festivals	Pleasure Travelers	Index
Size of Market	6,949,250	11,490,259	18,439,508	100
Shopping & Dining	92.6%	77.0%	82.9%	112
Historical Sites, Museums & Art Galleries	74.0%	48.8%	58.3%	127
Theme Parks & Exhibits	55.8%	29.1%	39.2%	143
Musical Concerts, Festivals & Attractions	50.6%	22.0%	32.7%	154
Wine, Beer & Food Tastings	35.3%	16.9%	23.8%	148
Science & Technology Exhibits	34.8%	16.1%	23.1%	151
Casinos	34.1%	21.0%	25.9%	132
Live Theatre	30.9%	15.1%	21.1%	147
Garden Theme Attractions	28.6%	11.0%	17.6%	162
Agro-Tourism	26.7%	9.0%	15.7%	170
Professional Sporting Events	22.8%	11.4%	15.7%	145
Aboriginal Cultural Experiences	20.8%	6.1%	11.6%	179
Amateur Tournaments	17.9%	8.1%	11.8%	151
High Art Performances	17.2%	7.2%	11.0%	156
Comedy Festivals & Clubs	16.8%	6.1%	10.1%	165
Spas	15.2%	6.9%	10.0%	152
Equestrian & Western Events	13.1%	2.8%	6.7%	197
Participatory Historical Activities	11.1%	4.0%	6.7%	166
National & International Sporting Events	5.3%	1.9%	3.2%	165
Literary & Film Festivals	5.0%	1.1%	2.6%	194

Culture and Entertainment Activities Pursued in a Typical Year

Fair and Festival Visitors are more likely than the average Canadian Pleasure Traveler to pursue a wide range of culture and entertainment activities while not traveling. They frequently dine in local restaurants and visit local fairs and festivals. Relative to the average Canadian Pleasure Traveler, they are especially likely to go to local bars and clubs (e.g., jazz club, bars with live music, recreational dancing), attend rodeos and stay overnight in local hotels or B&B's.

Fig. 7 Culture and Entertainment Activities Pursued in a Typical Year

	Fair and Festival Visitors	Did Not Visit Fairs or Festivals	Pleasure Travelers	Index
Size of Market	6,949,250	11,490,259	18,439,508	100
Going out to eat in restaurants	93.5%	90.3%	91.5%	102
Going to festivals or fairs	72.3%	54.9%	61.4%	118
Going to pick-your-own farms or farmers' market	48.9%	36.2%	41.0%	119
Going to amateur sporting events	47.6%	38.6%	42.0%	113
Going to historic sites or heritage buildings	45.4%	35.6%	39.3%	116
Going to museums	38.8%	29.1%	32.7%	119
Going to live theatre	38.6%	32.5%	34.8%	111
Going to art galleries or art shows	37.3%	28.4%	31.8%	117
Going to professional sporting events	36.6%	29.3%	32.1%	114
Going dancing	36.0%	26.1%	29.9%	121
Going to zoos or aquariums	36.0%	27.1%	30.4%	118
Going to amusement or theme parks	34.3%	25.6%	28.9%	119
Going to bars with live pop or rock bands	33.5%	24.2%	27.7%	121
Going to botanical gardens	30.8%	22.1%	25.4%	121
Going to rock music concerts	25.5%	20.6%	22.4%	113
Going to gamble in casinos	19.5%	17.3%	18.1%	108
Going to classical music concerts	18.8%	15.1%	16.5%	114
Going to day spas	16.5%	12.1%	13.8%	120
Staying overnight in a hotel or B&B in own city	12.4%	8.4%	9.9%	125
Going to jazz clubs	10.1%	6.0%	7.5%	134
Going to rodeos	9.6%	6.0%	7.3%	131
Going to the ballet	8.5%	6.6%	7.3%	116
Going to the opera	7.5%	6.1%	6.6%	113

Outdoor Activities Pursued While on Trips

Fair and Festival Visitors were more likely than the average Canadian Pleasure Traveler to participate in most outdoor activities while on trips. They frequently participated in ocean activities (e.g., sunbathing, swimming in ocean) and went wildlife viewing and boating and swimming (e.g., motorboating, swimming in lakes) while on trips. Relative to the average Canadian Pleasure Traveler, Fair and Festival Visitors were especially likely to have participated in physically strenuous outdoor activities (e.g., sports and games, skating, exercising & jogging, cycling, team sports) while on trips. This reflects the fact that Fair and Festival Visitors tend to be younger than the average Canadian Pleasure Traveler.

Fig. 8 Outdoor Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

	Fair and Festival Visitors	Did Not Visit Fairs or Festivals	Pleasure Travelers	Index
Size of Market	6,949,250	11,490,259	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	61.2%	40.9%	48.5%	126
Wildlife Viewing	57.9%	31.2%	41.2%	140
Boating & Swimming (e.g., motorboating, swimming in lakes)	53.9%	33.3%	41.1%	131
Hiking, Climbing & Paddling	46.3%	26.7%	34.1%	136
Sports & Games (e.g., tennis, board games)	36.4%	14.5%	22.7%	160
Fishing	29.3%	20.2%	23.6%	124
Exercising & Jogging	24.1%	10.9%	15.9%	152
Golfing	22.1%	16.0%	18.3%	121
Cycling	20.1%	9.6%	13.5%	149
Downhill Skiing & Snowboarding	19.1%	11.9%	14.6%	131
Skating (e.g., ice skating, rollerblading)	19.0%	7.7%	12.0%	159
Team Sports (e.g., hockey, baseball)	16.3%	8.4%	11.4%	143
Snowmobiling & ATVing	15.2%	9.0%	11.3%	134
Cross-country Skiing & Snowshoeing	13.8%	6.6%	9.3%	148
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	9.2%	4.5%	6.3%	146
Horseback Riding	7.4%	3.4%	4.9%	151
Hunting	4.9%	4.6%	4.7%	104
Freshwater Scuba & Snorkeling	4.3%	2.2%	3.0%	143
Wilderness Activities (e.g., wilderness skills course)	4.2%	1.2%	2.4%	179
Motorcycling	3.6%	2.6%	3.0%	120
Extreme Air Sports (e.g., parachuting)	1.8%	0.7%	1.1%	157

Outdoor Activities Pursued in a Typical Year

Fair and Festival Visitors are also more active than the average Canadian Pleasure Traveler in outdoor activities while not traveling. They frequently go on day outings to parks, exercise at home or at a fitness club, swim and garden while not on trips. Fair and Festival Visitors are also more likely than the average Canadian Pleasure Traveler to include jogging, canoeing or kayaking, rollerblading and horseback riding among their typical outdoor activities.

Fig. 9 Outdoor Activities Pursued in a Typical Year

	Fair and Festival Visitors	Did Not Visit Fairs or Festivals	Pleasure Travelers	Index
Size of Market	6,949,250	11,490,259	18,439,508	100
Day outing to a park	73.2%	63.0%	66.9%	109
Exercising at home or at a fitness club	65.5%	58.3%	61.0%	107
Swimming	64.8%	57.5%	60.3%	108
Gardening	63.6%	57.4%	59.8%	106
Picnicking	58.6%	49.7%	53.1%	110
Hiking	54.3%	45.4%	48.8%	111
Cycling	49.2%	41.3%	44.3%	111
Camping	43.9%	35.4%	38.6%	114
Fishing	31.2%	28.1%	29.3%	107
Ice-skating	30.8%	27.1%	28.5%	108
Golfing	30.3%	28.8%	29.4%	103
Jogging	29.0%	21.1%	24.1%	120
Sailing or other boating	27.5%	21.0%	23.4%	117
Playing team sports	26.3%	20.9%	22.9%	114
Playing racquet sports (e.g., tennis or badminton)	22.4%	17.1%	19.1%	117
Canoeing or kayaking	20.8%	14.5%	16.9%	123
Downhill skiing	18.7%	14.7%	16.2%	115
Rollerblading	17.4%	12.5%	14.4%	121
Riding an all-terrain vehicle (ATV)	15.6%	13.5%	14.3%	110
Cross-country skiing	13.8%	11.7%	12.5%	111
Snowmobiling	10.7%	9.2%	9.8%	109
Horseback riding	8.5%	5.8%	6.8%	125
Hunting	7.5%	7.9%	7.7%	97
Snowboarding	5.9%	4.5%	5.0%	117
Skateboarding	1.7%	1.5%	1.6%	108

Accommodation Stayed In While on a Trip

During the past two years, Fair and Festival Visitors were most likely to have stayed in public and private campgrounds and resorts (e.g., lakeside or riverside resorts, seaside resorts). However, relative to the average Canadian Pleasure Traveler, this activity segment was also more likely to have stayed in wilderness settings (e.g., remote or fly-in wilderness outposts) and several of the more unusual accommodation types (e.g., health spas, farm or guest ranch, houseboats, and cooking schools) while on trips.

Fig. 10 Accommodation Stayed in While on Trips

	Fair and Festival Visitors	Did Not Visit Fairs or Festivals	Pleasure Travelers	Index
Size of Market	6,949,250	11,490,259	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	35.2%	21.0%	26.4%	134
Lakeside / Riverside Resort	29.8%	17.8%	22.3%	134
Seaside Resort	26.7%	17.1%	20.7%	129
A Private Campground	24.8%	15.2%	18.8%	132
Ski Resort or Mountain Resort	18.1%	11.4%	13.9%	130
A Camp Site in a Wilderness Setting (Not a Campground)	11.0%	7.1%	8.6%	128
Health Spa	8.6%	4.3%	5.9%	145
Wilderness Lodge You Can Drive to by Car	8.2%	4.1%	5.6%	145
Country Inn or Resort with Gourmet Restaurant	7.0%	3.9%	5.1%	138
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	6.4%	3.3%	4.5%	142
Farm or Guest Ranch	4.9%	1.9%	3.0%	160
Remote or Fly-In Wilderness Lodge	2.1%	1.3%	1.6%	131
On a Houseboat	2.1%	0.9%	1.4%	151
Remote or Fly-In Wilderness Outpost	0.8%	0.4%	0.6%	148
Cooking School	0.6%	0.2%	0.4%	174
Wine Tasting School	0.3%	0.2%	0.3%	117

Tours and Cruises Taken During Past Two Years

Fair and Festival Visitors often took tours and cruises in the last two years. They most often took sameday tours (both guided and self-guided), city tours and scenic drives in the countryside. Relative to the average Canadian Pleasure, they were especially likely to have taken tours of wineries, factories and casinos, freshwater cruises (e.g., Great Lakes cruise, lake or river cruises), wilderness tours and air tours by airplane or helicopter.

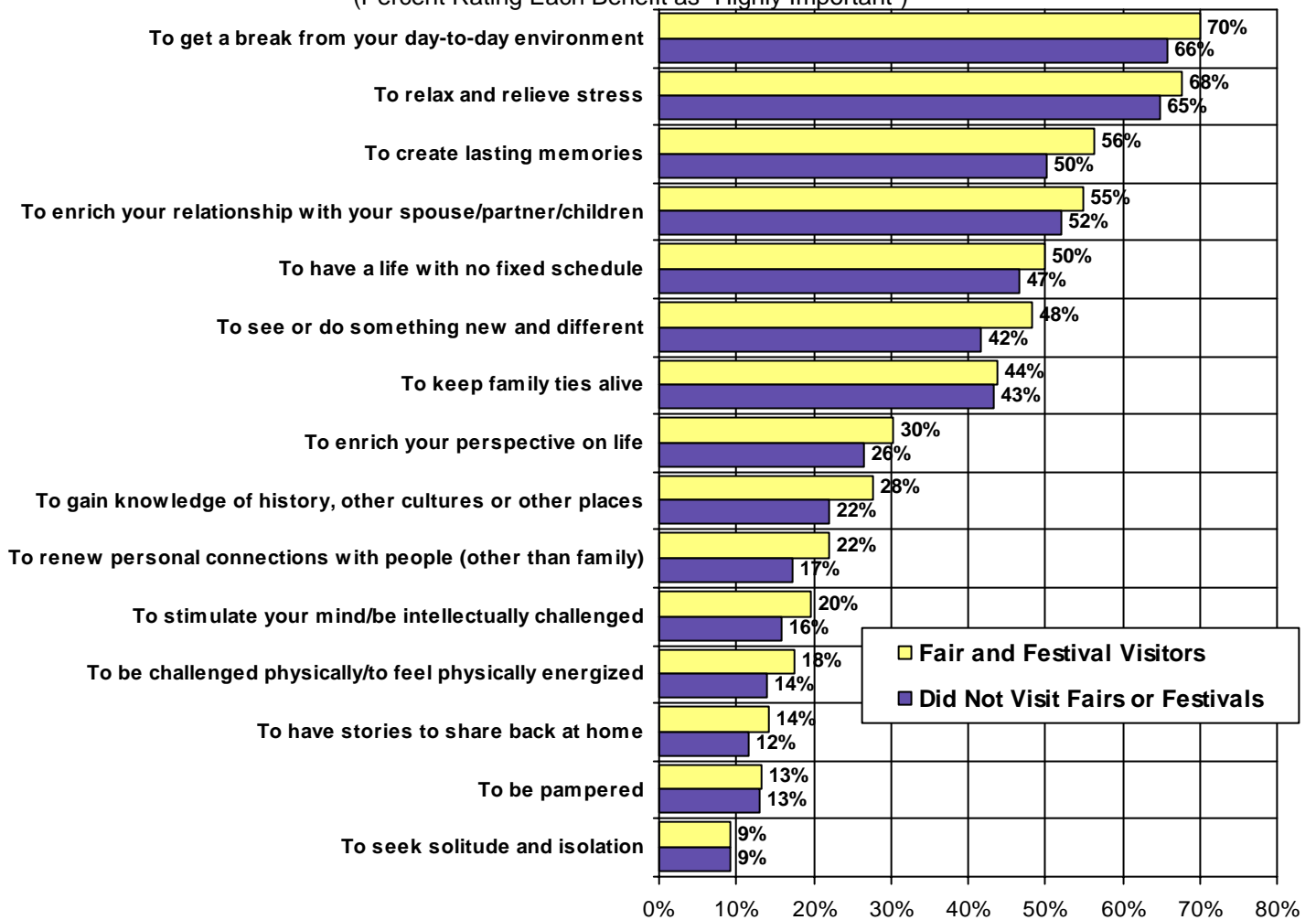
Fig. 11 Tours and Cruises Taken During Past Two Years

	Fair and Festival Visitors	Did Not Visit Fairs or Festivals	Pleasure Travelers	Index
Size of Market	6,949,250	11,490,259	18,439,508	100
A self-guided, sameday tour while on an overnight trip	38.1%	23.9%	29.3%	130
An organized, sameday, guided tour while on an overnight trip	27.6%	19.0%	22.2%	124
Around the city	30.8%	18.9%	23.4%	132
Around the countryside - scenic drives	30.4%	17.6%	22.4%	136
A self-guided, overnight tour where you stayed in different locations	24.4%	14.3%	18.1%	135
Wilderness tour	17.0%	10.6%	13.0%	131
On the water (sightseeing cruise)	17.8%	10.2%	13.1%	136
An organized, overnight, guided tour where you stayed in different locations	12.9%	8.4%	10.1%	128
Some other type of tour	14.4%	7.1%	9.8%	147
An organized, overnight, guided tour where you stayed in a single location	10.8%	6.1%	7.8%	137
To a casino	9.3%	4.9%	6.5%	142
Caribbean ocean cruise	6.5%	4.7%	5.4%	121
To a winery	8.9%	3.7%	5.6%	157
Ocean cruise – Other	3.8%	3.0%	3.3%	114
Cruise on another lake or river	3.2%	1.9%	2.4%	135
To a factory	4.1%	1.8%	2.6%	154
Cruise on the St. Lawrence River	2.4%	1.7%	1.9%	122
In the air as a pilot or passenger of an airplane or helicopter	2.5%	1.5%	1.9%	131
Alaskan ocean cruise	1.9%	1.5%	1.6%	115
Some other type of cruise	2.0%	1.4%	1.6%	124
Great Lakes cruise	1.1%	0.6%	0.8%	140
Submarine cruise	0.2%	0.1%	0.1%	142

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, Fair and Festival Visitors take vacations to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories, to enrich family relationships and live without a fixed schedule. However, relative to typical Canadian Pleasure Travelers, Fair and Festival Visitors especially value vacation destinations that offer novelty (e.g., to see or do something different), learning opportunities (e.g., gaining knowledge of the history and culture of a destination) and a chance to renew personal connections with friends.

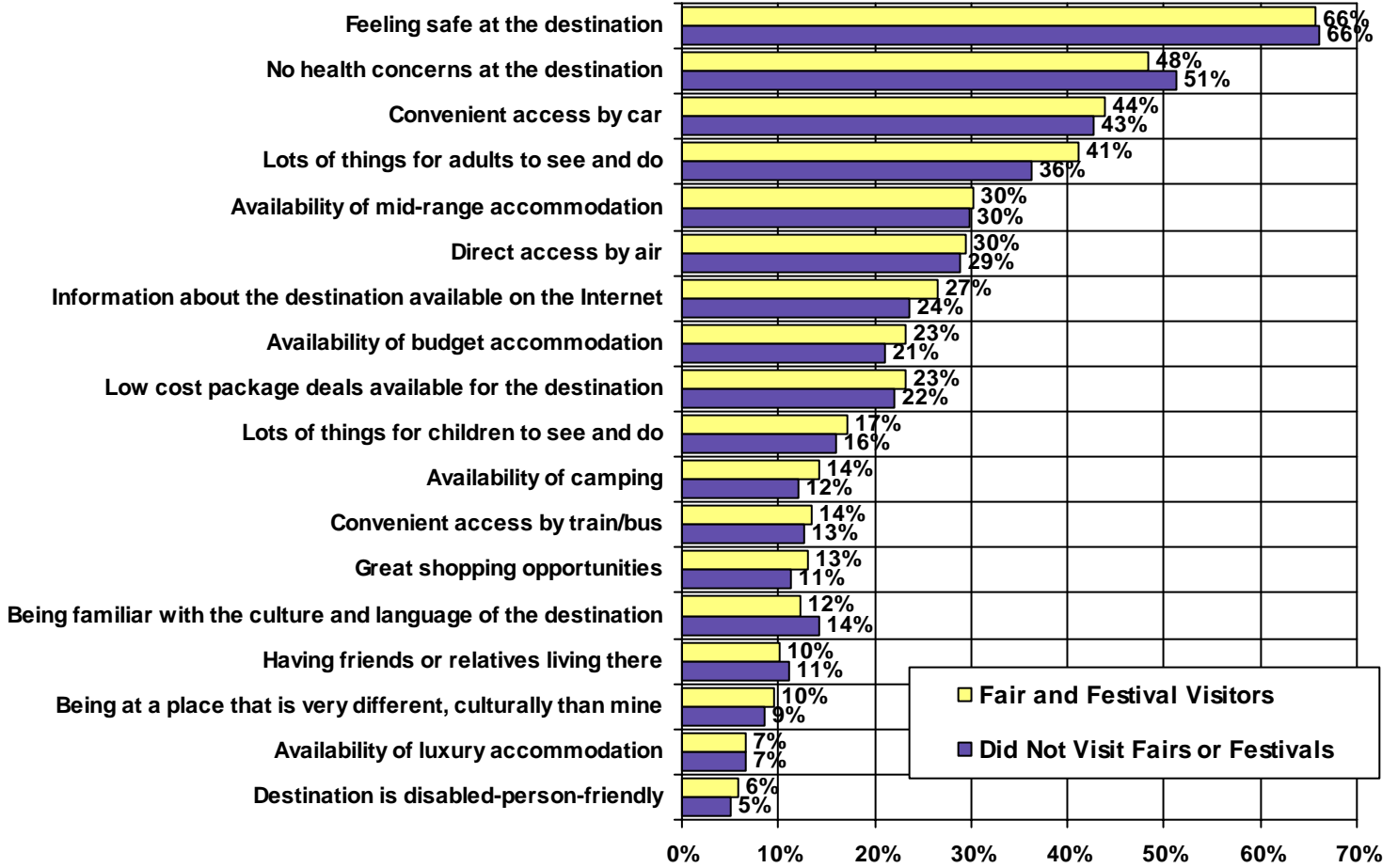
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, those who attended fairs and festivals consider it important to feel safe at a destination. However, relative to the average Canadian Pleasure Traveler, this activity segment especially looks for destinations that offer lots of things for adults to see and do.

Fig. 13 Importance of Destination Attributes (% Rating Each Attribute as "Highly Important")



How Destinations are Selected

Similar to the average Canadian Pleasure Traveler, Fair and Festival Visitors begin planning summer and winter trips with a particular destination in mind. They are next most likely to select a trip destination with a particular vacation experience in mind. The approaches used to select destinations by those who attended festival and fairs are similar to those of the average Canadian Pleasure Traveler.

Fig. 14 How Destinations Are Selected (Summer and Winter Vacations)

	Fair and Festival Visitors	Did Not Visit Fairs or Festivals	Pleasure Travelers	Index
Size of Market	6,949,250	11,490,259	18,439,508	100
Summer				
Started with a desired destination in mind	48.0%	48.7%	48.5%	99
Started by considering specific activities wanted to do	14.0%	13.6%	13.8%	102
Started with a certain type of vacation experience in mind	25.1%	22.8%	23.7%	106
Looked for packaged deals - no destination in mind	1.7%	1.1%	1.3%	126
Considered something else first	4.5%	4.2%	4.3%	104
Don't know / Other	6.7%	9.5%	8.4%	80
Winter				
Started with a desired destination in mind	48.4%	48.8%	48.6%	100
Started by considering specific activities wanted to do	16.5%	15.0%	15.6%	106
Started with a certain type of vacation experience in mind	21.6%	17.7%	19.3%	112
Looked for packaged deals - no destination in mind	2.7%	3.5%	3.2%	85
Considered something else first	3.9%	5.2%	4.7%	83
Don't know / Other	7.0%	9.8%	8.6%	81

Trip Planning and Information Sources Consulted

The majority of Fair and Festival Visitors were responsible for planning their trips either on their own (42.5%) or with someone else (16.4%). When making vacation plans, Fair and Festival Visitors typically consulted a wider variety of information sources than the average Canadian Pleasure Traveler. The majority in this segment use the Internet, word-of-mouth and past experiences to plan trips. However, this activity segment is especially likely to obtain trip planning information from television programs and advertising, newspaper advertising, government tourism bureaus (e.g., official travel guides or brochures, visitor information centres) and trade, travel or sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Fair and Festival Visitors	Did Not Visit Fairs or Festivals	Pleasure Travelers	Index
Size of Market		6,949,250	11,490,259	18,439,508	100
Who Plans Trips?	Respondent plans trips	42.5%	41.7%	42.0%	101
	Trip planning a shared responsibility	16.4%	16.5%	16.4%	100
	Someone else plans trips	41.1%	41.8%	41.5%	99
Information Sources Consulted	An Internet website	72.0%	61.0%	65.2%	110
	Advice of others / Word-of-mouth	60.9%	45.0%	51.1%	119
	Past experience / Been there before	57.5%	45.9%	50.4%	114
	A travel agent	38.6%	31.3%	34.1%	113
	Maps	38.4%	28.9%	32.6%	118
	Official travel guides or brochures from state / province	34.4%	20.7%	26.0%	133
	Visitor information centres	31.2%	18.5%	23.4%	133
	Articles in newspapers / magazines	27.3%	16.9%	20.9%	131
	An auto club such as CAA	22.2%	14.8%	17.7%	126
	Advertisements in newspapers / magazines	19.6%	10.9%	14.3%	138
	Travel guide books such as Fodor's	16.3%	12.0%	13.6%	120
	Programs on television	11.3%	5.1%	7.5%	151
	Travel information received in the mail	11.2%	7.4%	8.8%	126
	Advertisements on television	7.1%	3.7%	5.0%	143
	An electronic newsletter or magazine received by e-mail	5.6%	3.3%	4.2%	135
Visits to trade, travel or sports shows	4.9%	2.0%	3.1%	156	

Use of the Internet to Plan and Arrange Trips

Those who attended fairs and festivals are more likely than the average Canadian Pleasure Traveler to use the Internet to plan (66.5%) and book (43.1%) travel. However, relative to the other culture and entertainment activity types, Fair and Festival Visitors were the 16th most likely to plan travel using the Internet and the 15th most likely to book travel online. The majority use hotel or resort websites, the official tourism websites of countries, regions or cities and airline websites. The most commonly purchased trip components using the Internet were airline tickets and accommodation.

Fig. 16 Use of the Internet to Plan and Book Travel

		Fair and Festival Visitors	Did Not Visit Fairs or Festivals	Pleasure Travelers	Index
	Size of Market	6,949,250	11,490,259	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	33.5%	45.3%	40.8%	82
	Uses Internet to plan trips only	23.4%	21.4%	22.1%	106
	Uses Internet to book part of trip	43.1%	33.4%	37.0%	116
Types of Websites Consulted	A website of a hotel or resort	60.1%	54.7%	57.0%	105
	A tourism website of a country / region / city	54.5%	46.4%	49.8%	109
	An airline website	51.1%	42.8%	46.3%	110
	A travel planning/booking website	48.8%	43.4%	45.7%	107
	A website of an attraction	39.7%	30.6%	34.5%	115
	Some other website	29.2%	26.4%	27.6%	106
	A cruise line website	8.6%	7.7%	8.1%	107
	A motorcoach website	3.0%	2.0%	2.5%	122
Parts of Trips Booked Over The Internet	Air tickets	72.5%	67.1%	69.5%	104
	Accommodation	71.2%	67.6%	69.2%	103
	Car rental	30.0%	24.9%	27.1%	110
	Tickets or fees for specific activities or attractions	27.5%	20.6%	23.6%	116
	Tickets for rail, bus or boat / ship fares	19.0%	12.5%	15.3%	124
	A package containing two or more items	16.2%	14.8%	15.4%	105
	Other	4.7%	3.4%	3.9%	119

Media Consumption Habits

Fair and Festival Visitors are somewhat more likely than the average Canadian Pleasure Traveler to consume travel-related media, including the travel sections of newspapers, travel websites and travel shows on television. They are also more likely than others to consume home-related media (e.g., house & home websites; home & garden television shows; crafts, antiques & collectibles magazines). This segment may also be effectively targeted through photography and video magazines and shopping television channels.

Fig. 17 Media Consumption Habits

		Fair and Festival Visitors	Did Not Visit Fairs or Festivals	Pleasure Travelers	Index
	Size of Market	6,949,250	11,490,259	18,439,508	100
Newspaper Readership	Reads daily newspaper	88.7%	86.4%	87.3%	102
	Reads weekend edition of newspaper	88.7%	86.4%	87.3%	102
	Reads local neighbourhood or community newspapers	65.1%	59.4%	61.5%	106
	Reads other types of newspapers	19.3%	15.9%	17.2%	112
	Frequently or occasionally reads travel section of daily newspaper	51.1%	42.5%	45.7%	112
	Frequently or occasionally reads travel section of weekend newspaper	53.3%	43.8%	47.3%	113
Types of Magazines Read (Top 5 Indexed)	Photography and video	5.3%	3.3%	4.1%	132
	Crafts, antiques and collectibles	16.1%	10.4%	12.5%	128
	Magazines about your city	15.0%	10.1%	12.0%	125
	Regional magazines	9.7%	6.7%	7.9%	123
	Computers, electronics and technology	12.6%	9.1%	10.4%	121
Type of Television Programs Watched (Top 5 Indexed)	Shopping channels	5.4%	4.1%	4.6%	116
	Travel shows	35.0%	27.5%	30.3%	115
	Cooking shows	34.3%	30.2%	31.7%	108
	Music / Music video shows / channels	27.3%	24.4%	25.5%	107
	Home & garden shows	36.5%	32.7%	34.2%	107
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	10.0%	7.4%	8.4%	119
	Top 40 / Current hits	29.0%	22.8%	25.2%	115
	Jazz / Big band	10.0%	8.0%	8.8%	115
	Soft music / Adult contemporary	28.6%	24.0%	25.7%	111
	Modern rock / Alternative rock	41.1%	34.6%	37.1%	111
Types of Websites Visited (Top 5 Indexed)	Travel	57.3%	46.3%	50.6%	113
	House and home	31.8%	25.8%	28.1%	113
	Sites for specific activities or interests	40.2%	33.1%	35.9%	112
	Shopping (all types)	36.3%	31.7%	33.5%	108
	Network news sites (e.g., CBC, CNN)	39.2%	34.2%	36.1%	108

Appendix One Canadian TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Historical Sites, Museums & Art Galleries	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military /War Museums
	Museum - General History or Heritage Museums	Art Galleries
		Paleontological/Archaeological Sites
Shopping & Dining	Shop Or Browse - Bookstore or Music Store	Shop Or Browse – Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	High-End Restaurants with an International Reputation
	Went to Local Outdoor Cafes	Other High-End Restaurants
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and /or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Food /Drink Festivals
Science & Technology Exhibits	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks & Exhibits	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Entertainment Farms (e.g., Corn Maze, Petting Zoo)
	Wax Museums	
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	Professional Soccer Games
Live Theatre	Live Theatre	Live Theatre with Dinner
	Theatre Festivals	
Literary & Film Festivals	Literary Festivals or Events	International Film Festivals
Tastings	Went to Wineries for Day Visits and Tasting	Cooking /Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
Casinos	Went to a Casino	
Spas	Day Visit to a Health & Wellness Spas while on an Overnight Trip	
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National /Provincial Park
	Curatorial Tours	Archaeological Digs
Equestrian & Western Events	Equine (Horse) Competitions	Western Theme Events (e.g., Rodeos)
	Horse Races	

Appendix One		
Canadian TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Agro-Tourism	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	
National & International Sporting Events	Curling Bonspiel	National /International Sporting Events such as the Olympic Games
	Professional Figure Skating	
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related
Musical Concerts, Festivals & Attractions	Music Festivals	Musical Attractions
	Jazz Concert	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Rock & Roll/Popular Music Concert	Country & Western Music Concert
Comedy Festivals & Clubs	Comedy Festivals	Stand-up Comedy Clubs & Other Variety Shows

Appendix Two: Canadian TAMS 2006 Outdoor Activity Segmentation

Appendix Two: Canadian TAMS 2006 Outdoor Activity Segmentation		
Activity Segment	Activities in Segment	
Golfing	Played During a Stay at a Golf Resort with Overnight Stay	Golf Tour Package to Play on Various Courses
	Played an Occasional Game While on a Trip	
Hunting	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
Fishing	Fresh-Water Fishing	Salt-Water Fishing
	Ice Fishing	Trophy Fishing
Wildlife Viewing	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial /State Park
	Wildflowers /Flora Viewing	Viewing Northern Lights
Hiking, Climbing & Paddling	Mountain Climbing /Trekking	Fresh Water Kayaking /Canoeing
	Rock Climbing	Ocean Kayaking / Canoeing
	Hiking /Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
		White Water Rafting
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkeling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Scuba Diving in Sea/Ocean
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Freshwater Scuba & Snorkeling	Scuba Diving in Lakes /Rivers	Snorkeling in Lakes /Rivers
Exercising & Jogging	Working Out in Fitness Centre	Jogging or Exercising Outdoors
Cycling	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
Motorcycling	Overnight Touring Trip	Same Day Excursion
Horseback Riding	With an Overnight Stop	Same Day Excursion
Snowmobiling & ATVing	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
Downhill Skiing & Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing & Snowshoeing	Cross-country Skiing	Cross-country or Back Country as an Overnight Touring Trip
	Snowshoeing	
Wilderness Activities	Wilderness Skills Courses	Dog Sledding
	Ice Climbing	
Skating	Ice Skating	In-Line /Rollerblading
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	
Team Sports	Ice Hockey	Curling
	Football	Basketball
	Baseball or Softball	Soccer
Sports & Games	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	