

U.S. TRAVEL MARKET

Attending High Art Performances While on Trips Of One or More Nights

A Profile Report

July 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



Executive Summary

Over the last two years, 8.5% (18,666,340) of adult Americans attended high art performances while on an out-of-town, overnight trip of one or more nights. The ballet and other dance performances (4.0%) and classical music concerts (3.9%) were the most popular high art performances attended, followed by jazz concerts (2.9%) and the opera (1.4%). 34.4% (6,414,298) of those attending high art performances reported that this activity was the main reason for taking at least one trip in the past two years.

The majority of those who attend high art performances while on trips are women, 45 years of age or older. While most are married they are less likely than the average U.S. Pleasure Traveler to have dependent children living at home. Their level of education and household incomes (\$89,351) are well above-average. They are over-represented in Alaska and the Pacific, Middle Atlantic, New England and Mountain regions of the United States. They are also over-represented in large cities.

Over the past two years, those who attended high art performances on trips traveled more frequently than the average U.S. Pleasure Traveler and they were much more likely to have taken a trip to Canada (27.3% versus 14.6%). The most common Canadian destinations were Ontario, British Columbia and Quebec, however, they are highly over-represented among U.S. visitors to all Canadian provinces and territories. As such, this relatively affluent segment is a prime target for Canadian tourism initiatives.

Those who attended high art performances were much more active than the average U.S. Pleasure Traveler in culture and entertainment activities (e.g., historical sites, museums & art galleries), outdoor activities (e.g., ocean activities), and tours and cruises (e.g., sameday tours, sightseeing cruises) while on trips. They tended to stay at seaside, lakeside or riverside resorts and exhibited particular interest in luxury accommodation and attractions that feature gourmet cuisine and fine wine (e.g., fine dining & spas, wine, beer & food tastings, inn or resort with gourmet restaurant, winery tour). High art performance attendees seek vacation experiences that are novel, intellectually stimulating and provide opportunities to learn (e.g., gain knowledge of history or other cultures & places).

The Internet is a very important tool for this segment. Most used the Internet for planning (78.0%) and booking (59.8%) travel. They are avid consumers of travel-related media but can also be reached through arts-related media (e.g., city lifestyle magazines, jazz or classical music radio) and current events media (e.g., newspapers, news radio, news websites).

Travel Activity and Motivation Survey (TAMS)

The TAMS survey examines the recreational activities and travel habits of Canadians and Americans. The survey examines out-of-town, travel behaviour of one or more nights over the past two years and provides detailed information on Travelers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

TAMS represents a comprehensive assessment of travel behaviour and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada. In particular, TAMS was designed to:

- Identify existing and potential tourism markets;
- Measure the likelihood of these tourism markets being attracted to vacation experiences in Canada;
- Create packaging opportunities for each of these markets;
- Determine how to reach these markets (i.e., in terms of media strategies); and
- Provide information on how to fine-tune and target existing marketing campaigns.

TAMS was sponsored by the following organizations:

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

The survey was conducted in Canada and the United States between January 2006 and June 2006 and it includes only adults (18 years and over). The reference period for the data is 2004 and 2005.

The U.S. database is used in this current report. This survey was conducted by mail with an established U.S. mail panel. 60,649 completed questionnaires were returned. The mail panel response rate for this survey was 71.3%. The data have been weighted to project the results to the United States population.

This report profiles those who attended high art performances while on a trip, and compares them with other U.S. Pleasure Travelers (i.e., took at least one pleasure trip in the last two years). This report is part of a series of 43 Activity Reports prepared using the U.S. TAMS database.

Attending High Art Performances While on Trips

Market Incidence

Over the last two years, 8.5% (18,666,340) of adult Americans attended a high art performance while on an out-of-town, overnight trip of one or more nights. The most popular high art performances were the ballet and other dance performances (4.0%), and classical music or symphony orchestra concerts (3.9%). Jazz concerts were also popular (2.9%), followed by the opera (1.4%).

34.4% (6,414,928 adult Americans) of those who attended a high art performance while on a trip reported that this activity was the main reason for taking at least one trip in the past two years. Attending the opera was more likely to be the main reason for taking a trip than attending a classical music concert, the ballet or other dance performance, or a jazz concert.

Fig. 1 Incidence of Attending High Art Performances While on Trips¹

	Number Who Attended High Art Performances ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Size of Market	18,666,340	6,414,928	170,510,241	222,846,268
High Art Performances (All Activities)	18,666,340	34.4%	10.9%	8.5%
Ballet or other dance performance	8,943,774	30.9%	5.2%	4.0%
Classical or symphony concert	8,633,882	32.6%	5.1%	3.9%
Jazz concert	6,279,127	30.6%	3.7%	2.9%
Opera performance	3,151,222	42.0%	1.8%	1.4%
Participated in all four activities	611,411	22.7%	0.4%	0.3%

- 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 - Defined as individuals who attended high art performances while on an out-of-town, overnight 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 U.S. Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region, State and Population Size

Relative to the average U.S. Pleasure Traveler, those who attended high art performances while on trips are over-represented among those living in Alaska and the Pacific, Middle Atlantic, New England and Mountain regions of the United States. They are also more likely than average to live in large cities (population 2 million or more).

Fig. 2 Geographic Distribution & Population Size of Those Who Attended High Art Performances While on Trips

	Total Population	Estimated Number Who Went to High Art Performances on a Trip	Percent of Pleasure Travelers in Region Who Went to High Art Performances on a Trip	Percent of Total Regional Population Went to High Art Performances on a Trip
United States	222,846,268	18,666,340	10.9%	8.5%
New England	11,095,629	1,010,703	11.8%	9.3%
Middle Atlantic	31,005,526	2,785,537	12.1%	9.2%
East North Central	34,621,254	2,726,203	10.2%	7.9%
West North Central	15,024,360	993,443	8.3%	6.6%
South Atlantic	42,602,998	3,368,435	10.5%	8.0%
East South Central	13,597,436	1,037,011	10.9%	7.7%
West South Central	24,853,901	1,632,204	9.0%	6.7%
Mountain	15,030,720	1,336,641	11.0%	8.9%
Pacific	34,529,689	3,704,538	13.3%	10.8%
Alaska	484,754	71,624	17.0%	14.8%
Not Available	745,757	92,007	14.8%	12.3%
Less than 100,000	29,429,442	1,805,887	8.7%	6.2%
100,000 to 499,999	36,551,501	2,462,699	9.1%	6.8%
500,000 to 1,999,999	52,335,815	4,102,597	10.3%	7.9%
2,000,000 or more	103,783,753	10,203,151	12.4%	9.9%

Those who attended high art performances while on trips are most likely to live in Alaska, Mississippi, Rhode Island, California, New Hampshire and District of Columbia. They are least likely to live in West Virginia, Kentucky, Iowa, Arkansas, Idaho and Nebraska (see Fig. 3 on next page).

Demographic Profile

Those who attend high art performances on trips are slightly more likely to be female and are generally older than the average U.S. Pleasure Traveler. Although most are married, they are over-represented among those who are not married and tend not to have dependent children (under 18) living at home. Their level of education (30.0% post-graduate) and household incomes (\$89,351) are much higher than average.

Fig. 4 Demographic Profile of Those Who Attended High Art Performances on a Trip Relative to All U.S. Pleasure Travelers

Attribute	Size of Market	Attended a High Art Performance	Did Not Attend a High Art Performance ¹	Pleasure Travelers	Index ²
		18,666,340	151,843,901	170,510,241	100
Gender	Male	46.8%	48.7%	48.5%	97
	Female	53.2%	51.3%	51.5%	103
Age of Respondent	18 to 24	10.2%	10.9%	10.8%	94
	25 to 34	16.7%	21.5%	21.0%	80
	35 to 44	12.6%	17.9%	17.3%	73
	45 to 54	21.9%	20.9%	21.0%	104
	55 to 64	19.3%	15.0%	15.5%	124
	65 Plus	19.3%	13.8%	14.4%	134
Average Age		48.4	45.1	45.4	N/A
Marital Status	Not married	35.1%	30.0%	30.5%	115
	Married	64.9%	70.0%	69.5%	93
Parental Status	No children under 18	79.0%	68.9%	70.0%	113
	Children under 18	21.0%	31.1%	30.0%	70
Education	High school or less	9.8%	21.8%	20.5%	48
	Trade, Technical, Community Col.	15.9%	22.0%	21.4%	75
	University Degree	44.2%	40.7%	41.1%	108
	Post Graduate Degree	30.0%	15.5%	17.1%	176
Household Income	Under \$20,000	5.3%	8.4%	8.1%	66
	\$20,000 to \$39,999	11.8%	16.8%	16.2%	73
	\$40,000 to \$59,999	14.0%	17.0%	16.7%	84
	\$60,000 to \$79,999	14.5%	14.7%	14.7%	99
	\$80,000 to \$99,999	11.6%	11.6%	11.6%	100
	\$100,000 to \$149,999	18.8%	13.8%	14.4%	131
	\$150,000 or more	11.4%	6.1%	6.7%	171
	Not stated	12.6%	11.6%	11.7%	108
Average Household Income		\$89,351	\$72,475	\$74,303	N/A

- 1 - Those who "Did Not attend a High Art Performance" are defined as person who took at least one out-of-town, pleasure trip of one or more nights in the last two years but did not attend a high art performance on any trip. The number of Attendees and Non-Attendees equals the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for those who attended a High Art Performance in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which those who attended High Art Performances 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 U.S. Pleasure Traveler. Index values over 100 indicate that those participating in the activity are over-represented relative to the average U.S. Pleasure Traveler. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average U.S. Pleasure Traveler.

Travel Activity (During Last Two Years)

Those who attended high art performances while on trips have traveled more frequently over the past two years than the average U.S. Pleasure Traveler. They were more likely than average to have taken trips both within their own state and to other American states during the past two years. They were also much more likely than average to have visited Mexico, the Caribbean and overseas destinations.

Those who attended high art performances while on trips were almost twice as likely as the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (27.3% versus 14.6%). The most common destinations in Canada were Ontario (15.2%), British Columbia (9.6%) and Quebec (7.4%). However, this segment is highly over-represented among U.S. travelers to all Canadian provinces or territories, making them a prime target for Canadian tourism initiatives.

Fig. 5 Percent Traveling to Canada and Other Destinations during Past Two Years

	Attended a High Art Performance	Did Not Attend a High Art Performance	Pleasure Travelers	Index
Size of Market	18,666,340	151,843,901	170,510,241	100
All destinations	93.2%	84.5%	85.4%	109
Canada	27.3%	13.0%	14.6%	187
Newfoundland and Labrador	1.4%	0.3%	0.4%	327
Prince Edward Island	2.2%	0.4%	0.6%	353
New Brunswick	2.3%	0.6%	0.8%	284
Nova Scotia	3.3%	1.1%	1.3%	249
Quebec	7.4%	2.6%	3.1%	238
Ontario	15.2%	7.4%	8.3%	184
Manitoba	1.1%	0.5%	0.5%	214
Saskatchewan	1.2%	0.4%	0.5%	254
Alberta	2.9%	1.0%	1.2%	244
British Columbia	9.6%	3.5%	4.1%	232
Yukon	1.6%	0.4%	0.6%	278
Northwest Territories	0.9%	0.3%	0.4%	238
Nunavut	0.2%	LT 0.1%	LT 0.1%	372
Own State	87.5%	78.7%	79.7%	110
Other parts of the U.S.	95.8%	90.0%	90.6%	106
Mexico	23.5%	12.4%	13.6%	173
Caribbean	22.5%	11.5%	12.7%	176
All other destinations	19.6%	8.3%	9.5%	205

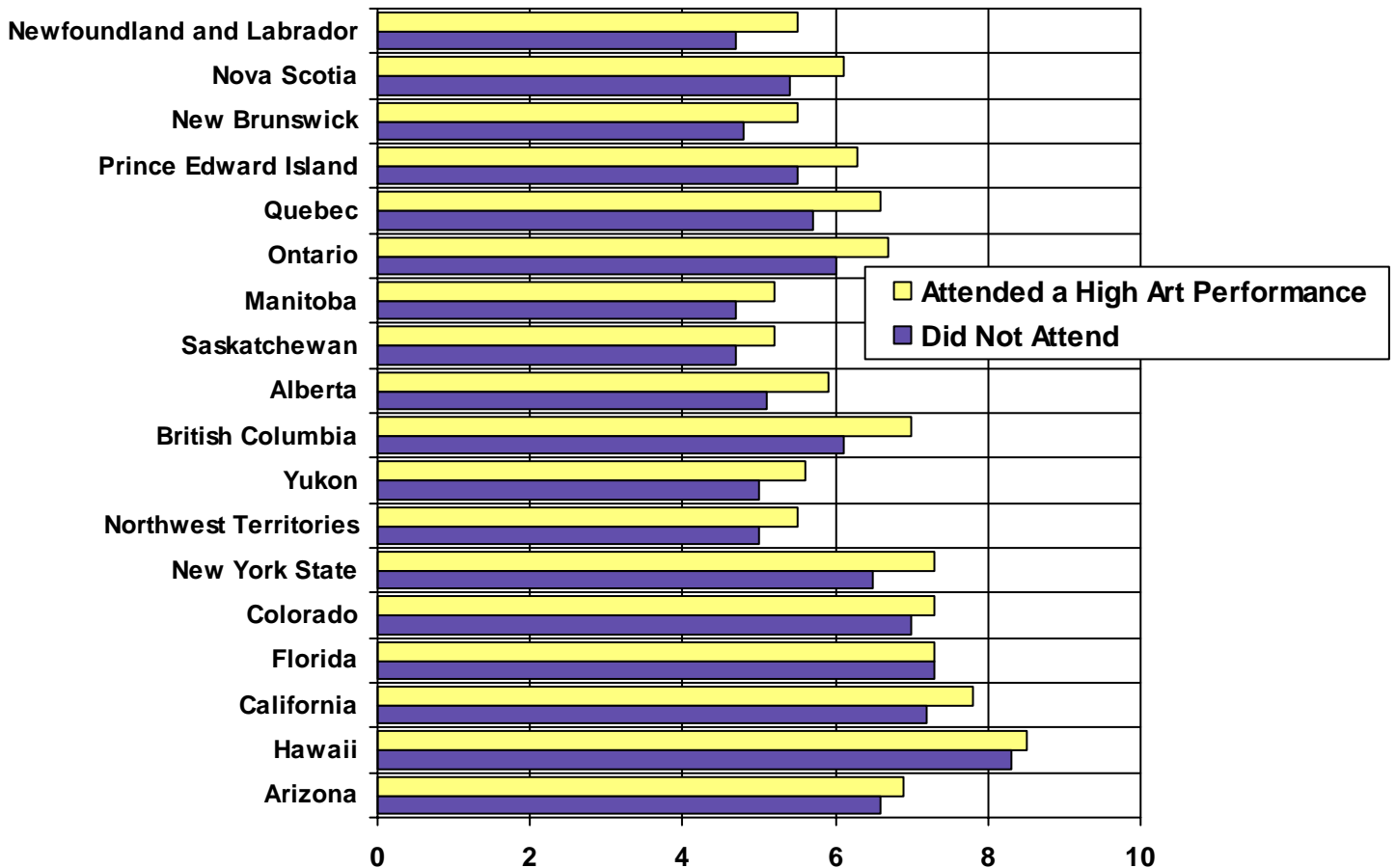
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Those who attended high art performances while on trips gave higher ratings than other U.S. Pleasure Travelers to all Canadian destinations. British Columbia (7.0) received the highest rating, followed by Ontario (6.7), Quebec (6.6), Prince Edward Island (6.3) and Nova Scotia (6.1).

This segment rated most of the U.S. reference states as being more appealing than the Canadian provinces or territories. Hawaii (8.5) received the highest rating from this segment, while New York State and California also received above-average ratings.

Fig. 6 Overall Rating of Appeal 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

Those who attended high art performances while on trips were also much more likely than the average U.S. Pleasure Traveler to pursue a wide range of culture and entertainment activities while traveling. Most went shopping and dining when on a trips and the majority enjoyed fine dining and spas and visited historical sites, museums and art galleries, casinos, theatre and comedy clubs, fairs and festivals, theme parks and exhibits and science and technology exhibits. This segment was also at least twice as likely as the average U.S. Pleasure Traveler to attend theatre, film and music festivals, wine, beer and food tastings and sporting events (e.g., professional sporting events, amateur tournaments, national & international sporting events). They were also more likely than the average U.S. Pleasure Traveler to have visited garden theme attractions and equestrian & western events and to have taken part in participatory cultural activities (e.g., aboriginal cultural experiences, archaeological digs, participatory historical activities, agro-tourism). Clearly, these travelers consider cultural and entertainment attractions and events to be an important aspect of their travel experience.

Fig. 7 Cultural and Entertainment Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Culture & Entertainment Activity)

	Attended a High Art Performance	Did Not Attend a High Art Performance	Pleasure Travelers	Index
Size of Market	18,666,340	151,843,901	170,510,241	100
Shopping & Dining	93.7%	75.7%	77.7%	121
Historical Sites, Museums & Art Galleries	81.6%	50.0%	53.5%	153
Casino, Theatre & Comedy Clubs	75.7%	41.7%	45.4%	167
Fairs & Festivals	72.6%	37.1%	41.0%	177
Theme Parks & Exhibits	67.8%	46.7%	49.0%	138
Fine Dining & Spas	60.7%	29.5%	33.0%	184
Science & Technology Exhibits	50.0%	21.7%	24.8%	202
Wine, Beer & Food Tastings	45.3%	20.2%	22.9%	197
Rock Concerts & Recreational Dancing	35.6%	12.7%	15.3%	234
Garden Theme Attractions	33.7%	11.2%	13.7%	247
Professional Sporting Events	31.9%	14.2%	16.1%	198
Equestrian & Western Events	29.5%	13.7%	15.5%	191
Theatre, Film & Musical Festivals	29.3%	5.7%	8.3%	352
Agro-Tourism	27.8%	11.8%	13.5%	205
Aboriginal Cultural Experiences	21.3%	7.0%	8.6%	249
Amateur Tournaments	16.8%	6.5%	7.7%	219
Archaeological Digs & Sites	14.9%	4.4%	5.5%	270
Participatory Historical Activities	11.2%	3.0%	3.9%	285
National & International Sporting Events	7.2%	1.2%	1.9%	386

Culture and Entertainment Activities Pursued While Not on Trips

Those who attend high art performances while on trips are also actively involved in a wide array of culture and entertainment activities when NOT traveling. Most in this segment visit restaurants, festivals or fairs, museums, historic sites or heritage buildings, live theatre, art galleries or shows, and zoos or aquariums when not traveling. They are also very likely to attend live art performances (e.g., classical music concerts, jazz clubs, ballet, opera) and visit botanical gardens and day spas when not traveling.

Fig. 8 Cultural and Entertainment Activities Pursued While Not on Trips

	Attended a High Art Performance	Did Not Attend a High Art Performance	Pleasure Travelers	Index
Size of Market	18,666,340	151,843,901	170,510,241	100
Going out to eat in restaurants	95.0%	92.6%	92.8%	102
Going to festivals or fairs	76.8%	64.1%	65.5%	117
Going to museums	63.6%	34.3%	37.5%	170
Going to historic sites or heritage buildings	60.6%	37.6%	40.1%	151
Going to live theatre	58.7%	25.5%	29.2%	201
Going to art galleries or art shows	58.2%	24.0%	27.8%	210
Going to zoos or aquariums	53.8%	44.6%	45.6%	118
Going to amateur sporting events	48.2%	38.9%	39.9%	121
Going to classical music concerts	43.5%	11.4%	14.9%	292
Going to professional sporting events	42.8%	33.9%	34.9%	123
Going to amusement or theme parks	40.4%	37.8%	38.1%	106
Going to pick-your-own farms or farmers' market	38.1%	30.8%	31.6%	121
Going to botanical gardens	37.1%	17.9%	20.0%	186
Going dancing	34.2%	19.2%	20.8%	164
Going to gamble in casinos	32.6%	27.4%	28.0%	116
Going to bars with live pop or rock bands	31.0%	22.6%	23.6%	131
Going to rock music concerts	28.4%	20.4%	21.3%	133
Going to jazz clubs	26.1%	5.7%	7.9%	330
Going to the ballet	26.1%	4.7%	7.0%	370
Going to the opera	22.4%	3.7%	5.7%	390
Going to day spas	19.7%	9.1%	10.3%	191
Staying overnight in a hotel or B&B in own city	17.2%	9.7%	10.6%	162
Going to rodeos	9.9%	8.0%	8.2%	120

Outdoor Activities Pursued While on Trips

Those who attended high art performances while on trips were also quite active in a wide array of outdoor activities while traveling. The majority participated in ocean activities (e.g., swimming in the ocean) and wildlife viewing while on trips. Relative to the average U.S. Pleasure Traveler, this segment was at least twice as likely to go cycling, horseback riding, sailing and surfing, cross-country skiing and snowshoeing, scuba and snorkeling, and exercising and jogging. They were also much more likely to have participated in a 'board & blade' activity (e.g., ice-skating) or an extreme sport while on a trip in the past two years.

Fig. 9 Outdoor Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

	Attended a High Art Performance	Did Not Attend a High Art Performance	Pleasure Travelers	Index
Size of Market	18,666,340	151,843,901	170,510,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	54.7%	37.7%	39.6%	138
Wildlife Viewing	53.6%	32.6%	34.9%	153
Hiking, Climbing & Paddling	39.3%	21.5%	23.5%	167
Games & Individual Sports (e.g., tennis, board games)	36.6%	20.5%	22.2%	165
Boating & Swimming (e.g., motorboating, swimming in lakes)	32.9%	19.6%	21.0%	156
Exercising & Jogging	30.3%	12.1%	14.1%	215
Fishing	22.2%	18.4%	18.8%	118
Golfing	16.4%	10.0%	10.7%	153
Team Sports (e.g., football, baseball, basketball)	14.8%	7.0%	7.9%	187
Cycling	14.4%	5.3%	6.3%	228
Horseback Riding	14.0%	5.2%	6.2%	227
Downhill Skiing & Snowboarding	13.9%	7.3%	8.0%	173
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	12.8%	3.8%	4.8%	268
Board & Blade (e.g., skateboarding, ice-skating)	10.6%	3.2%	4.0%	263
Snowmobiling & ATVing	10.2%	6.8%	7.1%	143
Scuba & Snorkeling	8.4%	3.5%	4.1%	207
Extreme Air Sports (e.g., parachuting, bungee jumping)	5.9%	1.2%	1.7%	340
Hunting	5.4%	5.4%	5.4%	101
Cross-country Skiing & Snowshoeing	5.3%	1.5%	1.9%	283
Motorcycling	4.7%	2.9%	3.1%	155
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	1.3%	0.2%	0.3%	400

Outdoor Activities Pursued While Not on Trips

When NOT traveling, those who attend high art performances on trips are more likely than the average U.S. Pleasure Traveler to participate in a variety of outdoor activities. The majority in this segment went on day outings to a park and picnicking, exercised at home or at a fitness club, went swimming and gardened at home. Relative to the average U.S. Pleasure Traveler, they are also more likely to go horseback riding, canoeing or kayaking, rollerblading, downhill or cross-country skiing, ice-skating and skateboarding and to play racquet sports when not traveling. However, they are less likely than the average U.S. Pleasure Traveler to go fishing, hunting or ATVing.

Fig. 10 Outdoor Activities Pursued While NOT on Trips

	Attended a High Art Performance	Did Not Attend a High Art Performance	Pleasure Travelers	Index
Size of Market	18,666,340	151,843,901	170,510,241	100
Day outing to a park	71.9%	62.0%	63.1%	114
Exercising at home or at a fitness club	68.0%	54.6%	56.0%	121
Swimming	63.1%	55.7%	56.5%	112
Gardening	59.1%	52.3%	53.1%	111
Picnicking	57.9%	46.5%	47.7%	121
Hiking	43.1%	31.2%	32.5%	133
Cycling	30.7%	21.9%	22.9%	134
Fishing	29.7%	33.1%	32.8%	91
Jogging	27.8%	18.5%	19.5%	142
Camping	26.6%	26.7%	26.7%	100
Sailing or other boating	25.5%	19.3%	20.0%	128
Golfing	21.4%	17.9%	18.3%	117
Playing racquet sports (e.g., tennis or badminton)	21.1%	12.2%	13.2%	160
Playing team sports	18.9%	15.4%	15.8%	120
Horseback riding	13.6%	8.0%	8.6%	158
Canoeing or kayaking	12.1%	7.3%	7.8%	154
Riding an all-terrain vehicle (ATV)	10.1%	11.6%	11.5%	88
Rollerblading	9.8%	7.0%	7.3%	134
Downhill skiing	9.0%	5.3%	5.7%	158
Hunting	8.6%	12.2%	11.8%	73
Ice-skating	8.5%	5.1%	5.5%	155
Cross-country skiing	5.8%	2.1%	2.5%	230
Snowmobiling	4.4%	3.2%	3.3%	132
Snowboarding	3.9%	2.5%	2.7%	146
Skateboarding	3.7%	2.0%	2.2%	169

Accommodations Stayed In While on Trips

Those who attended high art performances when on trips tended to stay at a seaside resort or at a lakeside or riverside resort when traveling in the past two years. This segment was also much more likely than the average U.S. Pleasure Traveler to have stayed in accommodations where cuisine is featured (e.g., health spa, country inn or resort with gourmet restaurant, cooking school, wine tasting school). They were also more likely than average to have stayed in some of the more unusual types of accommodation, including a houseboat and a remote or fly-in wilderness lodge or outpost.

Fig. 11 Accommodations Stayed In While on Trips

	Attended a High Art Performance	Did Not Attend a High Art Performance	Pleasure Travelers	Index
Size of Market	18,666,340	151,843,901	170,510,241	100
Seaside Resort	49.3%	35.7%	37.7%	131
Lakeside / Riverside Resort	36.0%	23.8%	25.6%	141
A Public Campground in a National, State, Provincial or Municipal Park	33.7%	35.0%	34.8%	97
Ski Resort or Mountain Resort	25.5%	17.2%	18.4%	138
A Private Campground	20.5%	21.0%	20.9%	98
Health Spa	15.8%	4.8%	6.5%	245
A Camp Site in a Wilderness Setting (Not a Campground)	11.8%	9.3%	9.6%	123
Wilderness Lodge You Can Drive to by Car	11.1%	6.5%	7.2%	155
Country Inn or Resort with Gourmet Restaurant	10.5%	3.0%	4.1%	258
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	9.7%	8.5%	8.7%	112
On a Houseboat	6.7%	2.3%	2.9%	229
Farm or Guest Ranch	6.7%	3.7%	4.1%	162
Cooking School	4.0%	0.7%	1.2%	340
Remote or Fly-In Wilderness Lodge	3.7%	1.3%	1.7%	221
Wine Tasting School	3.2%	0.5%	0.9%	362
Remote or Fly-In Wilderness Outpost	2.0%	0.7%	0.9%	217

Tours and Cruises Taken During Past Two Years

Those who attended high art performances on trips were more likely than the average U.S. Pleasure Traveler to have taken tours and cruises of all types during the past two years. Sameday tours (both organized and self-guided) and city tours were the most popular touring activities. However, relative to the average U.S. Pleasure Traveler, those who attended high art performances while on trips were much more likely to have taken both self-guided and guided overnight tours. They were also much more likely to have taken a tour of a casino, a winery and a factory, as well as air tours in an airplane or helicopter during the past two years. High art performance attendees were also twice as likely as the average U.S. Pleasure Traveler to have taken all types of cruises in the past two years, and especially sightseeing cruises and ocean cruises.

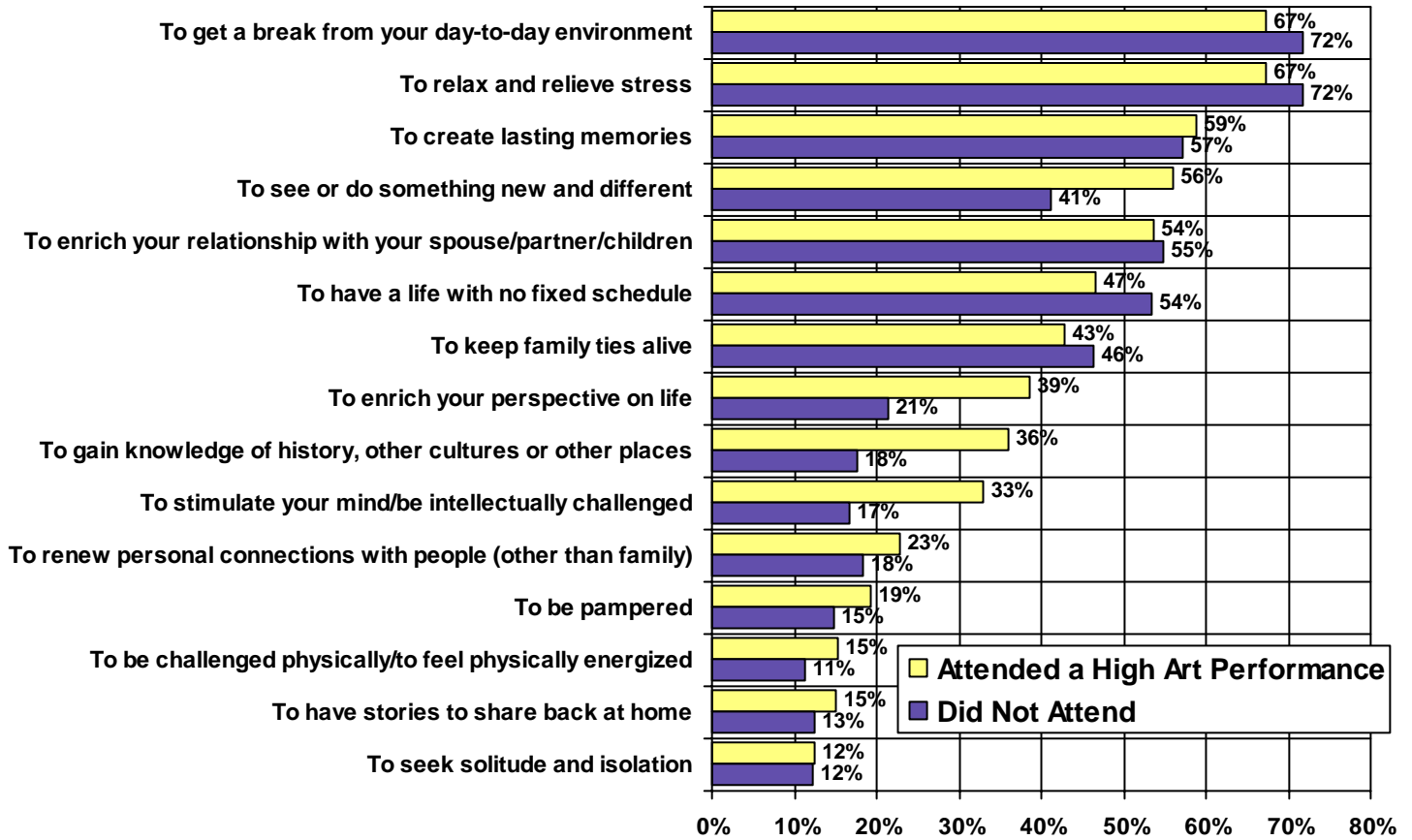
Fig. 12 Tours and Cruises Taken During Past Two Years

	Attended a High Art Performance	Did Not Attend a High Art Performance	Pleasure Travelers	Index
Size of Market	18,666,340	151,843,901	170,510,241	100
A self-guided sameday tour while on an overnight trip	32.7%	17.5%	19.2%	171
An organized sameday guided tour while on an overnight trip	31.2%	17.0%	18.5%	168
Around the city	31.0%	13.9%	15.8%	196
Around the country side - scenic drives	24.7%	11.7%	13.1%	189
A self-guided overnight tour where you stayed in different locations	21.9%	9.0%	10.4%	211
An organized overnight guided tour where you stayed in different locations	19.6%	6.4%	7.9%	248
On the water (sightseeing cruise)	17.1%	6.6%	7.8%	220
An organized overnight guided tour where you stayed in a single location	15.7%	5.6%	6.7%	234
Caribbean ocean cruise	15.7%	8.2%	9.0%	175
Some other type of tour	14.5%	8.1%	8.8%	164
Wilderness tour	13.1%	6.7%	7.4%	176
To a casino	11.0%	4.1%	4.9%	224
Ocean cruise - Other	10.4%	4.1%	4.8%	217
To a winery	9.8%	2.8%	3.6%	274
Alaskan ocean cruise	5.3%	2.1%	2.5%	213
Cruise on another lake or river	5.2%	1.6%	2.0%	264
To a factory	5.1%	1.4%	1.8%	279
Some other type of cruise	4.5%	1.4%	1.7%	265
In the air as a pilot or passenger of an airplane or helicopter	4.1%	1.1%	1.4%	289
Great Lakes cruise	1.3%	0.3%	0.4%	329
Cruise on the St. Lawrence River	0.8%	0.2%	0.3%	294
Submarine cruise	0.6%	0.2%	0.2%	254

Benefits Sought While on Vacation

Similar to the average U.S. Pleasure Traveler, the majority of those who attended high art performances when on trips take a vacation to get a break from their day-to-day environment, relax and relieve stress, create lasting memories, see or do something new and different and enrich family relationships. Relative to other U.S. Pleasure Travelers, this segment is especially likely to consider it important that a destination offer novelty (e.g., seeing or doing something new and different), intellectual stimulation and opportunities to learn (e.g., enriched perspective on life, new knowledge of history and other cultures or places).

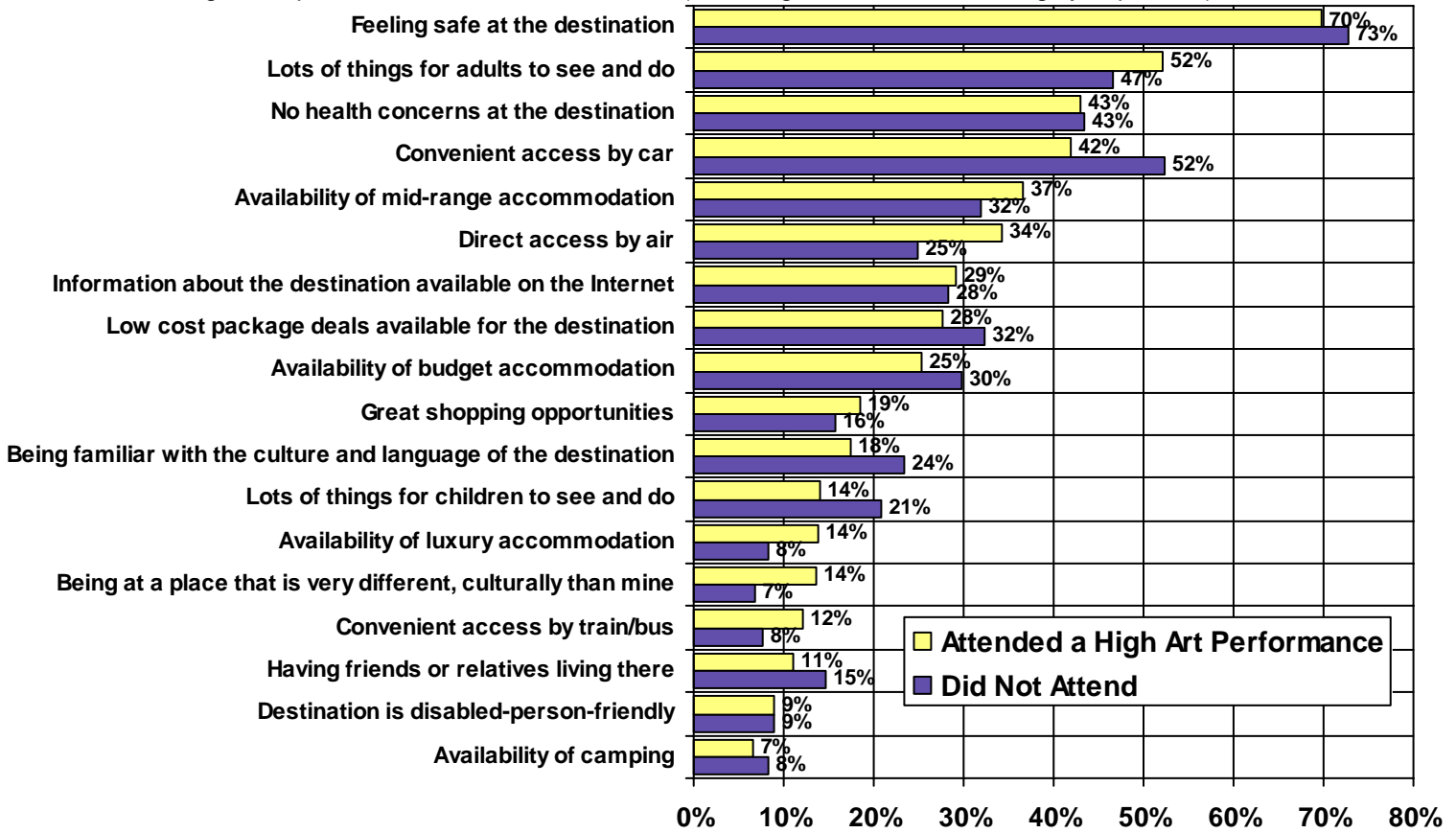
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most U.S. Pleasure Travelers, those who attend high art performances when on trips consider it important that they feel safe at a destination and have lots to see and do. Relative to other U.S. Pleasure Travelers, they are also more likely to consider it important that a destination has mid-range priced or luxury accommodation, direct access by air and a culture that is different from their home.

Fig. 14 Importance of Destination Attributes (% Rating Each Attribute as “Highly Important”)



How Destinations Are Selected

Respondents were asked a series of questions concerning how they select destinations. Similar to other U.S. Pleasure Travellers, the majority of those who attend high art performances while on trips start planning a summer or winter vacation with a desired destination in mind. They are also more likely than the average U.S. Pleasure Traveler to look for package deals without having a specific destination in mind.

Fig. 15 How Destinations Are Selected (Summer and Winter Vacations)

	Attended a High Art Performance	Did Not Attend a High Art Performance	Pleasure Travelers	Index
Size of Market	18,666,340	151,843,901	170,510,241	100
Summer				
Started with a desired destination in mind	59.4%	58.1%	58.2%	102
Started by considering specific activities wanted to do	9.7%	10.0%	9.9%	98
Started with a certain type of vacation experience in mind	18.6%	17.1%	17.3%	107
Looked for packaged deals - no destination in mind	2.3%	1.0%	1.1%	207
Considered something else first	4.4%	4.6%	4.6%	96
Don't know / Other	5.6%	9.3%	8.9%	63
Winter				
Started with a desired destination in mind	58.9%	58.9%	58.9%	100
Started by considering specific activities wanted to do	12.3%	11.1%	11.3%	109
Started with a certain type of vacation experience in mind	16.2%	14.5%	14.8%	110
Looked for packaged deals - no destination in mind	2.2%	1.3%	1.4%	154
Considered something else first	4.5%	5.5%	5.3%	84
Don't know / Other	5.8%	8.6%	8.3%	70

Trip Planning and Information Sources Consulted

Most of those who attended high art performances on trips were responsible for planning their trips either on their own (45.1%) or with someone else (17.1%). When making vacation plans, they tend to consult a wider variety of sources than the typical U.S. Pleasure Traveler. The majority in this segment use Internet websites, past experience and word-of-mouth as sources of information to plan trips. Relative to the average U.S. Pleasure Traveler, they are particularly likely to obtain trip planning information from articles and advertising in newspapers or magazines, travel guidebooks such as Fodor's, television programs and advertising, electronic newsletters / magazines, travel agents and trade, travel or sports shows.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Attended a High Art Performance	Did Not Attend a High Art Performance	Pleasure Travelers	Index
Size of Market		18,666,340	151,843,901	170,510,241	100
Who Plans Trips?	Respondent plans trips	45.1%	38.5%	39.2%	115
	Trip planning a shared responsibility	17.1%	17.7%	17.6%	97
	Someone else plans trips	37.8%	43.9%	43.2%	87
Information Sources Consulted	An Internet website	83.8%	75.0%	76.0%	110
	Past experience / Been there before	64.3%	53.2%	54.5%	118
	Advice of others / Word-of-mouth	54.5%	44.2%	45.4%	120
	Maps	42.3%	31.4%	32.7%	130
	An auto club such as AAA	35.7%	22.5%	24.0%	149
	Articles in newspapers / magazines	33.8%	16.1%	18.1%	186
	Official travel guides or brochures from state / province	33.0%	19.0%	20.6%	160
	A travel agent	32.1%	16.9%	18.6%	172
	Visitor information centres	29.6%	19.2%	20.4%	145
	Travel guide books such as Fodor's	25.2%	10.3%	12.0%	210
	Travel information received in the mail	24.4%	14.6%	15.8%	155
	Advertisements in newspapers / magazines	19.2%	9.8%	10.9%	177
	Programs on television	14.8%	6.1%	7.1%	207
	An electronic newsletter or magazine received by e-mail	12.5%	5.2%	6.0%	208
	Advertisements on television	7.3%	3.6%	4.0%	183
	Visits to trade, travel or sports shows	4.3%	2.2%	2.4%	177

Use of the Internet to Plan and Arrange Trips

78.0% of those who attend high art performances use the Internet to either plan or book travel. They are also more likely than the average U.S. Pleasure Traveler to use the Internet to book at least a part of a trip (59.8%). The majority use travel planning / booking websites (e.g., Expedia), hotel or resort websites and airline websites. They are more likely than average to consult a cruise line website or a motorcoach website.

Those who attended high art performances when on trips most often purchase airline tickets and accommodation over the Internet. They are also more likely than average to use the Internet to book rail, bus or boat / ship tickets, tickets for specific activities or attractions and travel packages.

Fig. 17 Use of the Internet to Plan and Book Travel

		Attended a High Art Performance	Did Not Attend a High Art Performance	Pleasure Travelers	Index
	Size of Market	18,666,340	151,843,901	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	22.0%	32.1%	31.0%	71
	Uses Internet to plan trips only	18.2%	20.3%	20.1%	91
	Uses Internet to book part of trip	59.8%	47.6%	48.9%	122
Types of Websites Consulted	A travel planning / booking website	66.5%	54.1%	55.6%	119
	A website of a hotel or resort	61.4%	52.2%	53.3%	115
	An airline's website	61.2%	43.3%	45.6%	134
	A tourism website of a country / region / city	43.6%	33.9%	35.1%	124
	A website of an attraction	42.0%	32.1%	33.4%	126
	Some other website	28.9%	24.5%	25.1%	115
	A cruise line website	20.5%	11.3%	12.4%	165
	A motorcoach website	2.5%	1.2%	1.3%	184
Parts of Trips Booked Over The Internet	Air tickets	82.1%	68.8%	70.6%	116
	Accommodations	76.1%	71.2%	71.9%	106
	Car rental	49.7%	36.2%	38.0%	131
	Tickets or fees for specific activities or attractions	39.6%	24.3%	26.3%	150
	A package containing two or more items	26.6%	16.4%	17.8%	149
	Tickets for rail, bus or boat / ship fares	22.7%	10.2%	11.9%	191
	Other	4.0%	2.8%	2.9%	137

Media Consumption Habits

Those who attend high art performances when traveling are avid consumers of travel-related media. They are much more likely than the average U.S. Pleasure Traveler to read the travel sections of daily newspapers and travel magazines, to watch travel-related television programs and to visit travel-related websites. This segment's patronage of the performing arts is reflected in their interest in jazz, classical music and multicultural radio programming. They are also much more likely to read city and regional magazines, photography and video magazines and magazines about business, finance and investing. High Art Performance attendees also exhibit a keen interest in news programming (e.g., newspapers, news or talk radio, and news websites).

Fig. 18 Media Consumption Habits

		Attended a High Art Performance	Did Not Attend a High Art Performance	Pleasure Travelers	Index
Size of Market		18,666,340	151,843,901	170,510,241	100
Newspaper Readership	Reads daily newspaper	68.9%	58.8%	59.9%	115
	Reads weekend edition of newspaper	63.1%	54.6%	55.5%	114
	Reads local neighbourhood or community newspapers	57.3%	48.6%	49.5%	116
	Reads other types of newspapers	24.6%	12.6%	13.9%	177
	Frequently or occasionally reads travel section of daily newspaper	60.1%	40.9%	43.0%	140
	Frequently or occasionally reads travel section of weekend newspaper	66.2%	47.2%	49.3%	134
Types of Magazines Read (Top 5 Indexed)	Magazines about your city	16.4%	5.8%	6.9%	236
	Travel (e.g., Condé Nast)	23.6%	9.0%	10.6%	222
	Photography and video	8.4%	3.3%	3.9%	217
	Regional magazines	14.1%	5.9%	6.8%	206
	Business, finance and investing	24.7%	12.7%	14.0%	177
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	43.4%	27.2%	28.9%	150
	Biography	45.2%	31.4%	32.9%	137
	Shopping channels	9.7%	7.5%	7.7%	125
	History	55.0%	43.7%	45.0%	122
	Late night talk shows	32.9%	26.4%	27.1%	121
Type of Radio Programs Listened To (Top 5 Indexed)	Jazz / Big band	25.1%	8.2%	10.0%	251
	Classical music	33.0%	11.8%	14.1%	233
	Multicultural	10.5%	4.0%	4.7%	222
	Soft music / Adult contemporary	34.5%	23.4%	24.6%	140
	News / Talk / Information	45.2%	30.8%	32.4%	139
Types of Websites Visited (Top 5 Indexed)	Magazine sites	20.5%	14.1%	14.8%	138
	Travel	62.8%	46.1%	48.0%	131
	Newspaper sites	37.9%	28.5%	29.6%	128
	Network news sites (e.g., CNN)	48.5%	37.4%	38.7%	125
	Health	50.1%	40.8%	41.8%	120

Appendix One		
U.S. 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
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	Went to Local Outdoor Cafes
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	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Food/Drink Festivals	Circus
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	Wax Museums
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	Jazz Concert
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	
Theatre, Film & Musical Festivals	Theatre Festivals	International Film Festivals
	Comedy Festivals	Music Festivals
	Literary Festivals or Events	
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)
Casino, Theatre & Comedy Clubs	Stand-Up Comedy Clubs and Other Variety Shows	Live Theatre with Dinner
	Went to a Casino	Live Theatre
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National/Provincial Park
	Curatorial Tours	
National & International Sporting Events	National/International Sporting Events such as the Olympic Games	Curling Bonspiel
	Professional Figure Skating	Professional Soccer Games

Appendix One		
U.S. TAMS 2006 Culture and Entertainment Segmentation		
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Rock Concerts & Dancing	Rock & Roll / Popular Music Concert	Recreational Dancing
Archaeological Digs & Sites	Archaeological Digs	Paleontological / Archaeological Sites
Equestrian & Western Events	Equine (Horse) Competitions	Country / Western Music Concerts
	Western Theme Events (e.g., Rodeos)	Auto Races
	Horse Races	
Fine Dining & Spas	High-End Restaurants with an International Reputation	Day Visit to a Health and Wellness Spa while on an Overnight Trip
	Other High-End Restaurants	
Agro-Tourism	Dining At A Farm	Harvesting and / or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	Entertainment Farms (e.g., Corn Maze, Petting Barnyard)
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related

Appendix Two: U.S. 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	White Water Rafting
	Hiking /Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
	Ice Climbing	Wilderness Skills Courses
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkelling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Ocean Kayaking or Canoeing
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Scuba & Snorkelling	Scuba Diving in Lakes /Rivers	Scuba Diving in Sea /Ocean
	Snorkelling 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	Snowshoeing
Extreme Skiing	Heli-Skiing	Cross Country or Back Country as an Overnight Touring Trip
	Ski Jouring	
Hockey, Skating, Rollerblading & Skateboarding	Ice-Hockey	In-Line /Rollerblading
	Ice-Skating	Skateboarding
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	Bungee Jumping
Team Sports	Football	Basketball
	Baseball or Softball	Soccer
Games & Individual Sports	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	