



Heritage Tourism Product Overview

BUILDING TOURISM WITH INSIGHT

HERITAGE

April 2009

This profile summarizes information on the heritage tourism sector in British Columbia and contains a demographic and travel profile of travellers who participate in heritage activities while on pleasure trips. Also included, is information on other outdoor and cultural activities participated in by heritage travellers, estimates of international heritage travellers to BC, the supply of heritage tourism products in BC, a discussion of global and national trends within the sector; and information related to the economic impact of the heritage sector in general.

Information in this report has been compiled from several sources, including the 2006 Travel Activities and Motivations Study, Statistics Canada, the World Tourism Organization, Canadian Tourism Commission, the Royal BC Museum, and the Canadian Museums Association.

Demographic Profile

DEMOGRAPHIC PROFILE OF HERITAGE TRAVELLERS

Pleasure travellers participating in the Travel Activities and Motivations Survey (TAMS) who had been to British Columbia in the past two years, were asked to indicate if they had participated in a heritage activity¹ while on a trip (in the past two years). Those who had participated in these activities were further asked if heritage activities had been a primary motivating factor for any of their trips.

- Among Canadian and American heritage travellers who either participated in or were motivated by heritage activities, there was an equal proportion of males and females. Among Canadians who were motivated to visit heritage sites, the gender split was 51% female, 49% male. Among American travellers the numbers were nearly reversed with 52% of motivated travellers being male and 49% female (see Table 1).
- Canadian heritage travellers were younger overall than US heritage travellers. The largest group of Canadians were between the ages 18 to 34 (31% participated; 29% motivated), while the largest group of Americans were age 65 and over (25% participated; 32% motivated). In fact, the number of motivated heritage travellers in the 65 years or older age group was more than double among American heritage travellers compared to Canadian travellers (15%).
- Almost three-quarters of both American and Canadian participating heritage travellers (62% and 64% respectively) reported annual household incomes over \$60,000. Similarly, over six in ten motivated Canadian and American heritage travellers (62% each) also had household incomes in the same category which is higher than the typical Canadian and American pleasure travellers. Nearly one third of Canadian heritage travellers (34% participated; 30% motivated) and over one third of US heritage travellers (37% both participating and motivated) reported annual household incomes over \$100,000.
- Overall, levels of education among US heritage travellers were slightly higher than their Canadian counterparts. Among US motivated heritage travellers, the vast majority (86%) had completed some post-secondary education or higher, while 73% of motivated Canadian travellers had also completed some post-secondary or higher.

¹ Heritage activities included visits to historic buildings or sites, museums, archaeological or paleontological sites, interpretive programs at a historic site or park, curatorial tours, and historical re-enactments. Unless otherwise noted, information in this report is from the 2006 Travel Activities and Motivations Survey.

Table 1: Demographic profile of heritage travellers from Canada and the US

Demographics of Heritage Travellers from Canada and the US who have been to BC	Canada		US	
	Participate	Motivate	Participate	Motivate
Adults 18+	3,276,997	697,674	5,028,662	1,512,642
Unweighted Numbers	4,390	998	1,513	438
Gender				
Male	49.4%	48.7%	52.1%	51.5%
Female	50.6%	51.3%	47.9%	48.5%
Age				
18-34	31.2%	28.6%	18.7%	15.9%
35-44	18.5%	16.4%	12.8%	11.8%
45-54	22.4%	22.8%	23.4%	17.7%
55-64	15.9%	17.0%	20.5%	22.4%
65+	11.9%	15.1%	24.6%	32.2%
Household Income				
Under \$40,000	13.4%	15.0%	10.7%	10.7%
\$40,000-\$59,999	14.7%	15.5%	13.8%	16.9%
\$60,000-\$99,999	28.0%	32.4%	26.6%	25.0%
\$100,000 or more	33.5%	29.5%	37.3%	36.8%
Not stated	10.4%	7.5%	11.5%	10.6%
Education				
Less than Secondary	4.7%	4.8%	1.1%	0.8%
Completed Secondary	20.7%	21.4%	6.4%	8.1%
Some Post Secondary	13.0%	13.8%	21.9%	24.1%
Completed Post Secondary	61.0%	59.4%	68.0%	62.2%
Other	n/a	n/a	0.6%	1.2%
Not stated	0.7%	0.5%	2.0%	3.6%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

* Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

DEMOGRAPHICS BY SPECIFIC HERITAGE ACTIVITY – CANADIAN PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

- Exploring the gender profile of Canadian heritage travellers who had visited British Columbia according to the specific types of heritage activity revealed only minor variations from overall travellers to BC. The gender split was even among those who were motivated to visit historic sites, whereas men were slightly more likely to be motivated by museums and interpretive programs. Women were slightly more likely (54%) to be motivated by archaeological activities (see Table 2).
- Those between 18 and 34 represented the largest group of travellers who had visited British Columbia and who were motivated by historic sites (28%) and museums (29%). Those motivated by archaeology and interpretive programs were more likely to be in the 45 to 54 age group (28% and 35%, respectively).
- Across all heritage travel activities, the Canadian heritage motivated traveller (is more likely to report an annual household income over \$60,000.
- Canadian heritage travellers to British Columbia were also slightly more likely to report that they had completed post secondary education as compared to the typical Canadian pleasure traveller.

Table 2: Demographics by specific heritage activity for travellers from Canada

Demographics of Canadian Travellers who have been to BC by Heritage Type	All Canadian Travellers who visited BC	Type of Heritage Activity (Motivated)			
		Historic Sites	Museums	Archaeology	Interpretive Programs
Total	5,651,177	498,288	286,909	156,218	63,458
Unweighted Numbers	7,315	699	420	202	83
Gender					
Male	49.9%	49.5%	55.3%	46.2%	52.7%
Female	50.1%	50.5%	44.7%	53.8%	47.3%
Age					
18-34	31.4%	28.1%	28.6%	24.2%	10.0%
35-44	18.8%	14.8%	14.5%	26.3%	23.6%
45-54	21.3%	22.5%	20.7%	27.6%	34.8%
55-64	14.9%	18.4%	20.4%	12.7%	19.9%
65 +	13.5%	16.2%	15.8%	9.3%	11.6%
Household Income					
Under \$40,000	17.6%	16.5%	16.7%	10.8%	10.4%
\$40,000-\$59,999	13.9%	15.1%	14.4%	15.8%	11.4%
\$60,000-\$99,999	27.4%	31.7%	25.3%	38.0%	39.1%
\$100,000 or more	29.1%	30.2%	34.9%	31.0%	35.5%
Don't Know/Not Stated	12.0%	6.6%	8.8%	4.4%	3.6%
Education					
Less than Secondary	7.2%	4.7%	3.4%	4.5%	2.7%
Completed Secondary	24.9%	20.3%	24.7%	21.3%	13.6%
Some Post Secondary	12.0%	15.7%	12.1%	15.2%	22.8%
Completed Post Secondary	55.1%	58.7%	59.2%	58.0%	59.0%
Not Stated	0.7%	0.6%	0.6%	1.0%	1.9%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

* Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

DEMOGRAPHICS BY SPECIFIC HERITAGE ACTIVITY – AMERICAN PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

- The gender split among American heritage travellers who had visited British Columbia was relatively evenly distributed among those motivated by each of the specific heritage activities. Men were slightly more likely to be motivated by historic sites and museums, whereas women were slightly more likely to be motivated by archaeology and interpretive programs (see Table 3), similar to their Canadian counterparts.
- The age profile of American heritage travellers was considerably older compared to Canadian heritage travellers. Overall, less than a quarter of all American visitors to British Columbia were age 65 or over (23%), whereas approximately a third of those motivated by historic sites (34%), museums (31%), archaeology (30%), and of those motivated by interpretive programs (36%).
- American heritage travellers who had visited British Columbia and were motivated by each of the heritage activities profiled were also more likely to be from higher income earning households. A total of 39% of those motivated by historic sites, 41% of those motivated by museums and archaeology (each), and 45% of those motivated by interpretive programs reported annual household incomes over \$100,000 compared to just over a third of all US Pleasure travellers to BC.
- Those motivated by each type of heritage activity were most likely to indicate that they had completed post secondary education. There were not, however, noteworthy differences between these categories and the overall traveller to British Columbia from the US.

Table 3: Demographics by specific heritage activity for travellers from the United States

Demographics of US Travellers who have been to BC by Heritage Activity Type	All US Travellers who visited BC	Type of Heritage Activity (Motivated)			
		Historic Sites	Museums	Archaeology	Interpretive Programs
Total	7,025,878	1,138,720	838,535	360,807	147,203
Unweighted Numbers	2,196	330	225	93	41
Gender					
Male	52.2%	53.9%	51.8%	45.5%	46.2%
Female	47.8%	46.1%	48.2%	54.5%	53.8%
Age					
18-34	21.5%	15.7%	12.5%	15.0%	9.2%
35-44	13.6%	11.1%	11.5%	5.5%	3.4%
45-54	21.9%	16.8%	18.2%	19.5%	34.1%
55-64	19.7%	22.8%	26.7%	29.6%	17.5%
65 +	23.3%	33.6%	31.2%	30.4%	35.7%
Household Income					
Under \$40,000	13.0%	11.3%	8.6%	5.0%	11.8%
\$40,000-\$59,999	13.6%	16.9%	14.6%	16.4%	16.7%
\$60,000-\$99,999	27.4%	25.0%	25.8%	24.0%	27.1%
\$100,000 or more	34.5%	39.1%	40.7%	40.6%	44.5%
Don't Know/Not Stated	11.6%	7.7%	10.3%	14.0%	0.0%
Education					
Less than Secondary	1.6%	1.1%	0.0%	0.0%	0.0%
Completed Secondary	7.9%	6.5%	7.7%	14.6%	4.2%
Some Post Secondary	23.4%	23.4%	19.0%	17.5%	17.6%
Completed Post Secondary	64.7%	63.6%	65.1%	63.5%	67.5%
Not Stated	1.9%	4.2%	6.3%	3.6%	8.8%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

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Travel Profile

TRAVEL BY CANADIAN AND US HERITAGE PLEASURE TRAVELLERS

- According to data collected in the 2006 Travel Activities and Motivations Survey, there were over 3.2 million Canadians who travelled to British Columbia and who also participated in a heritage activity while travelling in the past two years. This represents over half of the total 5.6 million Canadian travellers who made at least one trip to BC in the past two years (58%). Further, nearly 700,000 travellers to BC were primarily motivated by heritage for at least one trip, representing 12% of all Canadian travellers to BC (see Table 4).
- Overall, there were over 7 million American travellers who made at least one trip to British Columbia in the past two years. The percentage American pleasure travellers who participated in heritage activities (72%) and traveled to BC was higher compared to Canadian heritage travellers. The incidence of Americans who were motivated by heritage activities was nearly double at 22%.
- Heritage travellers (participating and motivated) from both Canada and the US were more likely than all Canadian and American travellers to British Columbia, to be frequent travellers (having made at least five out-of-town pleasure trips in the past two years). Among all Canadian travellers to BC, 58% could be classified as frequent travellers, whereas 66% of participating and 72% of motivated Canadian heritage travellers reported travelling with the same frequency. For Americans, those who participated in heritage activities were also most likely to be frequent travellers. A total of 65% of all American travellers who had visited BC travelled five or more times in the past two years. This percentage rose to 71% among participating American heritage travellers and 70% among those who were motivated by heritage activities.
- When asked to rate the appeal of British Columbia on a scale of one to ten, heritage travellers from both countries were more likely than the overall traveler who had visited BC to provide a rating higher than eight. However, the

difference between heritage travellers and all travellers in both countries was quite small. Among all travellers from Canada, 88% rated the appeal of BC eight or higher, while 89% of both participating and motivated Canadian heritage travellers provided a similar rating. Among all US travellers to BC, 76% rated BC eight or higher, while 77% of both participating and motivated US heritage travellers provided the same rating.

- Heritage travellers (participating and motivated) from both countries were slightly more likely than all travellers to report travelling in summer and in winter as compared to the average traveller.

Table 4: Travel profile of Canadian and American heritage travellers

	Canada			US		
	All Travellers who Visited BC	Participate	Motivate	All Travellers who Visited BC	Participate	Motivate
Total	5,651,177	3,276,997	697,674	7,025,878	5,028,662	1,512,642
Unweighted Numbers	7,315	4,390	998	2,196	1,513	438
Total number of out-of-town pleasure trips taken in past two years						
One	6.9%	4.2%	1.6%	3.3%	2.3%	2.2%
Two	11.8%	8.3%	8.7%	8.7%	6.2%	8.8%
Three	11.9%	10.9%	7.3%	9.5%	8.6%	7.6%
Four	11.5%	11.1%	10.8%	11.7%	10.9%	11.2%
Five Or More	57.9%	65.5%	71.5%	65.4%	71.0%	69.5%
Not Stated	0.0%	0.0%	0.0%	1.3%	0.9%	0.7%
Appeal Of British Columbia - Rated on a scale of 1 to 10						
8 to 10	87.5%	89.1%	89.2%	75.7%	77.4%	76.5%
4 to 7	9.6%	8.9%	9.1%	18.2%	17.6%	17.9%
1 to 3	1.1%	0.8%	0.6%	2.6%	2.4%	2.4%
Don't Know	0.6%	0.5%	0.1%	2.2%	1.8%	1.8%
Not Stated	1.2%	0.7%	1.0%	1.2%	0.9%	1.5%
Season travelled						
Summer	89.9%	93.4%	93.3%	87.7%	89.1%	86.5%
Winter	71.0%	75.2%	73.0%	77.4%	80.8%	79.6%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one of more nights.

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OTHER DESTINATIONS VISITED

- Among British Columbian travellers who participated in a heritage activity while travelling, a large majority (91%) travelled within BC, while among all Canadian heritage travellers 37% made an overnight visit to BC. Both motivated BC heritage travellers and motivated Canadian heritage travellers were only slightly less likely to have visited BC compared to those who participated in a heritage activity while travelling (90% and 31%, respectively).
- Among British Columbian and Canadian heritage travellers who had made at least one trip to BC in the past two years, the next most popular destination was to the US. Overall, two thirds of both Canadian heritage travellers and British Columbian heritage travellers had also visited the US in the past two years (66%). Other popular destinations included Alberta (62% of Canadians and 51% of British Columbians), Ontario (46% of Canadians and 27% of British Columbians) and Mexico and the Caribbean (31% of both Canadians and British Columbians).
- Of the 79.1 million US travellers who participated in a heritage activity while on a trip in the past two years, 6% had made at least one overnight trip to British Columbia. The percentage is the same (6%) for motivated US heritage travellers who had visited BC.
- Other than travel within the US, American heritage travellers who visited British Columbia were more likely to have travelled to Mexico or the Caribbean compared to any other location (44% participated; 48% motivated).
- Of those US heritage travellers who travelled to British Columbia in the past two years, they were more likely to travel to other destinations outside of Canada than they were to have visited Alberta (18% participated; 24% motivated), or Ontario (22% participated; 32% motivated).

OTHER ACTIVITIES (OUTDOOR AND CULTURAL) PARTICIPATED IN

- Among Canadian, British Columbian and American heritage travellers who travelled to British Columbia in the past two years, city strolls, visits to a nature park (provincial/national), and sunbathing were also popular activities (see Table 5).
- City strolls was the top other activity for both participating and motivated heritage travellers to British Columbia from all of Canada, British Columbia and US heritage travellers. Although, US heritage travellers had a higher incidence of visiting Well-known Natural Wonders compared to their Canadian counterparts.
- US heritage travellers were less likely to have sunbathed (38% participated and motivated) or gone swimming in a lake (21% participated; 22% motivated) compared to those from BC or all Canadian locations.

Table 5: Other outdoor and cultural activities participated in by heritage travellers

Activities	BC		Canada		US	
	Participate	Motivate	Participate	Motivate	Participate	Motivate
Stroll A City To See Buildings	73.8%	78.2%	71.7%	74.8%	69.6%	69.2%
Sunbathing/Sitting On A Beach	53.9%	50.7%	53.4%	52.8%	38.1%	37.8%
Nature Park- National/Provincial	51.7%	47.8%	51.5%	51.8%	53.1%	51.9%
Well Known Natural Wonders	40.7%	36.7%	47.5%	50.2%	58.3%	62.3%
Swimming In Lakes	43.2%	49.5%	45.7%	46.0%	20.5%	21.7%
Hiking - Same Day Excursion	45.7%	39.1%	44.0%	42.1%	39.5%	36.9%
Swimming In Oceans	42.3%	36.8%	41.6%	40.1%	35.2%	32.8%
Art Galleries	41.0%	49.1%	40.1%	46.7%	44.1%	50.0%
Farmers' Markets/ Country Fair	41.6%	30.8%	36.0%	33.2%	38.5%	41.8%
Botanical Gardens	27.4%	25.8%	29.9%	31.6%	40.1%	44.7%
Zoos	21.7%	23.7%	25.3%	28.5%	34.3%	43.4%
Aquariums	24.9%	26.1%	25.0%	24.1%	36.8%	42.6%
Museum - Science/Technology	19.4%	26.6%	21.3%	27.0%	34.6%	39.9%
Wildlife - Land Based Animals	22.5%	22.5%	25.0%	27.4%	37.0%	39.1%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one of more nights.

International Heritage Travellers

- For the 2007 International Travel Survey, overseas travellers were asked to indicate whether anyone in their travel party had visited a museum or art gallery or an historic site on their trip. Among those who had spent at least one night of their trip in BC, 39% indicated that someone in their travel party had spent time at a museum or art gallery, while 41% indicated that an historic site was part of their trip. This represents nearly half a million international visitors to the province who had taken part in each of these activities while on pleasure trips that included time in British Columbia.

Supply of Heritage Tourism Sector Products in British Columbia

- Visits to the Royal BC Museum were up 84% in 2007-08, compared to the previous year. This is in large part attributable to the special exhibit Titanic: The Artifact Exhibition which was attended by 470,000 paid visitors in the six month period during which the exhibit was open. In 2006-2007, nearly half (44%) of the museum's visitors were residents of British Columbia, however, 43% of the BC market indicated that this was their first visit.²
- Vancouver's Gastown district is one of the most frequently visited cultural sites in Canada, according to UNESCO³

² Royal BC Museum Annual Report 2007-2008. Available at http://www.royalbcmuseum.bc.ca/Content_Files/Files/AR_RBCM2007-08WEB.pdf.

³ Statistics Canada. Travel-log, Summer 2001, vol. 20, no.3.

Global and National Overview and Trends in Heritage Tourism

- According to the World Tourism Organization⁴, worldwide cultural and heritage tourism is growing significantly faster than tourism in general. The profile of global heritage travellers indicates that they are more likely to be older, middle to upper class individuals with high levels of education and income; however, this trend is shifting towards younger individuals with high levels of education and income.
- According to a recent national study exploring local government perspectives on tourism development, cultural and heritage tourism was identified as a key tourism opportunity for communities. Celebrations and festivals were identified as priorities by 62% of survey participants, heritage for 55%, and cultural for 51%.⁵
- Nearly half (48%) of all respondents to a recent national survey of Canadian residents have visited a museum in the past year on at least one occasion. Visiting museums in other communities was also popular with 38% paying a visit to a museum in another location during the past year and 62% encouraging visitors to explore these institutions during their trip. There were small differences between French and English speakers with those speaking English more likely to include a museum on their list of things to do while travelling (78% compared to 69% of French language speakers). The survey also found little gender difference between Canadians who visit museums and those who don't, although the majority of museum goers (81%) are over the age of 45. When asked about their main reason for visiting a museum, 70% said it was to be both entertained and to have an educational experience.⁶
- According to Statistics Canada⁷, nearly 60,000 visits were made to the nation's 2,500 heritage institutions (excluding nature parks) in 2002/03.

Economic Impact of Heritage Tourism

- Overall, operating revenues of Canada's heritage institutions were just over \$1 billion in 2006, up 1.3% from the previous year. In combination, visits to history and science museums, planetariums, observatories and exhibit centres accounted for 43% of the operating revenues generated from heritage institutions in Canada in 2006. Heritage institutions in British Columbia accounted for 15% of the country's total revenue.⁸
- In 2002/03, heritage institutions in Canada employed 10,939 full-time and 14,588 part-time workers.⁹
- Aboriginal tourism businesses contributed approximately \$35 million a year to British Columbia's economy in 2007. This number is expected to grow to \$50 million a year with the approach of the 2010 Olympic Games in Vancouver.¹⁰

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⁴ www.unwto.org

⁵ Executive Summary, Tourism Insights 2007, Grant Thornton available at <http://www.linkbc.ca/torc/downs1/TourismInsights2007ExecutiveSummary.pdf>.

⁶ Canadians and their Museums: A Survey of Canadians and their Views about the Country's Museums. Prepared for: Canadian Museum Association, March 2003. Available at <http://www.museums.ca/media/Pdf/surveyanalysis2003.pdf>

⁷ Statistics Canada. Summary Table: Profile of Heritage Institutions in Canada (Excluding Nature Parks), 1993/94, 1995/96, 1997/98, 1999/00, and 2002/03. Available at <http://www40.statcan.gc.ca/l01/cst01/arts06-eng.htm>.

⁸ Statistics Canada, The Daily, March 26, 2008.

⁹ See (9) above.

¹⁰ Indian and Northern Affairs Canada, Spring 2008. Aboriginal Tourism Takes Flight in British Columbia. Available at http://www.ainc-inac.ca/bc/fnbc/sucsty/crgn/abtrsm/abtrsm_e.html.