

Langley New Heritage Centre Study Market Assessment

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1.1 Introduction

The Langley Heritage Centre (the Heritage Centre) is a vision that takes the existing Langley Centennial Museum and National Exhibition Centre and Langley into a realm of heritage tourism—focusing on “agritourism”. This vision, which positions the Heritage Centre as an innovative facility model unique in British Columbia, is fully presented in *The Perfect Fit: Right Place, Right Time: New Heritage Centre Project Concept, March, 2005*. The vision imagines the Heritage Centre as a truly multi-purpose facility, extending far beyond a traditional museum. It is a place where the historical record is kept, the history of the community is presented and interpreted, and where visitors participate in a variety of programs and activities that take place not only at the facility, but throughout the Township of Langley. The Heritage Centre becomes the ‘community concierge’ and agritourism packager. Naturally, the strong agritourism theme makes food integral to the concept. The Heritage Centre seen as offering a range of food and cuisine related experiences, such as “Taste of BC” community lunches and farmers’ market-style “Food Theme of the Week” displays.

The strength of the proposed Langley concept lies in its capacity to foster inclusiveness throughout Langley’s community and to attract a strong partnership base with a variety of organizations. However, it is a concept that relies on a supporting marketing and promotion program that positions Langley as a unique rural community destination for those city dwellers and tourists seeking a way to connect with a peaceful and neighbourly rural way of life. In other words, a destination orientation which focuses on Langley’s unique travel generators and offers the customers a variety of activities is essential to the success of the Heritage Centre.

A foundation for the project concept is preliminary research and analysis of the potential visitor market for the new vision. The visitor market research involved three main components:

- review of the overall arts and heritage tourism market as well as the four niche tourism markets – learning and experiential tourism, agritourism, wine and culinary tourism, and Aboriginal tourism – which hold particular potential for the new Heritage Centre.
- review of the Langley visitor market, focussing on the available resident and visitor market.
- review of the Heritage Centre’s potential to draw visitors, assuming the project concept outlined above and the adoption of a destination tourism orientation by the Township. This component included reviewing Langley’s heritage tourism assets, research into relevant agritourism initiatives and projects, and interviews with representatives of the B.C. government, tourism industry and travel trade.

The results of the research are summarized in this *Market Assessment*.

1.2 Arts and Heritage Tourism

1.2.1 Canadian Participation in Heritage Activities

The introduction by Statistics Canada of cultural supplements to their General Social Surveys of 1992 and 1998 has made available detailed information on Canadians’ participation in heritage activities. The findings of these reports and of studies on arts and heritage participation in the Greater Vancouver region and the Langley region in particular are detailed in Appendix 1. Highlights are presented in this section.

This market research clearly illustrates that Canadians are highly interested in arts and heritage. Residents of B.C. had the highest museum attendance levels of all provinces in both 1992 (45%) and 1998 (40%). Residents of Alberta and Ontario – Vancouver’s other key domestic tourism source markets – also have high attendance levels. However, attendance at community museums has dropped during the 1990s, suggesting that the new Langley Heritage Centre must be more than a community museum if it is to be successful.

An interesting finding is that there are significant interest overlaps among the museum, performing arts and art gallery visitor markets. The interest overlaps in these areas as well as in sports participation point to opportunities for the Heritage Centre to develop joint programs and packages with Langley area arts, cultural, festival and sports organizations. In addition, the high degree of volunteerism shown among museum visitors also indicates that there is potential for expanding the facility’s existing cadre of volunteers.

Activity Overlaps: B.C. Attendance Rates by Activity – 1998 (%)

Activities	Performing Arts Visitors	Museum Visitors
Performing arts events	100.0%	59.1%
Museums	n/a	100.0%
Art galleries	50.4%	n/a
Cultural festivals	32.9%	31.0%
Sports participation	50.9%	46.1%
Volunteer participation	54.6%	50.7%

Sources: Hills, 2004a; Hills, 2004b.

Langley area residents view arts and heritage activities as being important for both their personal and community well-being. They display lower museum attendance rates than GVRD residents overall, however they are just as likely as GVRD residents to get involved in participatory arts and heritage activities, suggesting that they prefer to do rather than just being spectators.

GVRD & Langley Region Residents Attitudes – 2000 (%)

Importance Rating	Importance to Respondent		Importance to Community	
	GVRD Residents	South of Fraser/ Langley Residents	GVRD Residents	South of Fraser/ Langley Residents
Important	34%	23%	42%	42%
Somewhat important	30%	29%	47%	43%
Somewhat	25%	34%	8%	4%
Not important	9%	6%	1%	1%

Source: Canadian Facts, 2000.

The socio-demographic profiles of the Langley communities show that residents of the District Municipality possess the higher than average education and income levels associated with high

museum attendance rates. Residents of Langley City do not rate as highly in these areas, implying that residents of the District Municipality have the most audience development potential.

The research revealed that the new Langley Heritage Centre has at least one audience development and marketing challenge. This is the general decline in museum attendance rates among Canadians and B.C. residents. Percentage attendance rates at all museums by B.C. residents declined about 5% between 1992 and 1998, while their attendance at community museum dropped nearly 7% during the period. This decline suggests that heritage attractions, and community museums in particular, are finding it more and more difficult to compete with the many other forms of entertainment available to today's consumer.

Research on factors for increasing arts and heritage attendance reveals that Langley residents are seeking more events closer to home and a wider range of events, findings which are positive for the new Heritage Centre. There are lack of awareness prevents Langley residents from attending more events, implying that a well planned and executed marketing strategy is needed to draw residents to the new Heritage Centre.

1.2.2 Arts and Heritage Tourism Market

The Canadian Tourism Commission (CTC) defines cultural and heritage tourism as “tourism which “occurs when participation in a cultural or heritage activity is a significant factor for travelling” (CTC, 1999). The U.S. National Trust's definition is “travelling to experience the places and activities that authentically represent the stories and people of the past and present” (www.nationaltrust.org/heritage_tourism/index.html?cat=2). These definitions illustrate that arts and heritage tourism includes a range of culture and heritage forms including art galleries, museums, interpretive centres, historic sites, performing arts, visual arts, festivals and events. They also show that authenticity and the opportunity to learn about and learn from local people are central to quality arts and heritage tourism experiences.

Globally, demand for arts and heritage tourism experiences that allow the participant to learn by seeing and doing is skyrocketing and this form of tourism is expected to be one of hottest trends of the 21st century. The World Tourism Organization estimates that 37% of all international trips include a culture/heritage component and that the market is growing at an annual rate of 15% (CTC, 1999).

The CTC's business strategy for cultural and heritage tourism reports that the Canadian and American markets should be the focus for Canadian arts and heritage tourism over the shorter term. The following sections provide brief overviews of recent market findings on both of these markets.

US and Canadian Arts and Heritage Tourists

Several recent studies show that heritage tourism is popular among US travellers and the market is growing. Several other niche arts, culture and heritage tourism markets with potential for the Langley Heritage Centre are also growing. They are agritourism, wine and culinary tourism, learning tourism, and Aboriginal tourism. Relevant findings of recent studies on these markets are provided in Appendix 1 while key highlights are presented in this section.

The market research reveals the following with regard to the size of the US and Canadian markets for arts and heritage tourism:

- A 2002 CTC study focussing on Heritage Tourism Enthusiasts, found that 34.5 million (17%) of American adults fit the profile of this market segment in 2002. Of this total, 24% had taken a leisure trip in Canada within the two preceding years, representing a market of 8.3 million adults for Canada's heritage tourism products (CTC, 2002b).
- The CTC study on Heritage Tourism Enthusiasts concluded that 2.6 million (11%) Canadians fit the profile in 2002. Of these, about 80% had taken a trip in Canada in the preceding two years, representing a market of 2.2 million adults for Canada's heritage tourism products (CTC, 2002).
- In the case of Wine and Culinary Enthusiasts, a recent study concluded that 21.6 million American adults (11% of the total market) fit this profile. About one in four of these adults also has travelled in Canada within the past two years, providing an estimated market of 5.5 million for Canada's wine and culinary tourism experiences (CTC, 2003f).

Meanwhile, the total Canadian Wine and Culinary Enthusiast market is estimated at 1.8 million adults. Of these, eight out of ten have taken a holiday in Canada the past two years, providing a domestic wine and culinary tourism market of 1.5 million adults (CTC, 2003c).

- The size of the Agritourism market has been estimated at 115 million adults in the US and 13 million adults in Canada (CTC, 2001b).
- In the case of Learning Tourism, a recent Canadian Tourism Commission study found that 7.2% (12.1 million) of travellers in North America sought out a participatory hands-on learning experience while on vacation during the previous two years. In addition, 8.0% of travellers (13.8 million) expressed an interest in participating in this type of vacation experience over the next two years (CTC, 2001).

Another notable finding of the research is that demographic changes in Canada and US between 2000 and 2025 will result in substantial increases in the number of people who fit the arts and heritage tourist market profiles.

The interest and activity overlaps seen among Canadian Heritage Tourism Enthusiasts and Wine and Culinary Enthusiasts mirror the findings of studies on domestic arts and heritage attendance patterns. Similar overlaps within the identical US market segments show that such market overlaps also exist across the border. Moreover, there is evidence of shared interests with the Learning Tourism and Aboriginal Tourism segments. The relatively strong interest links among all of these markets reinforce the idea that there is much potential for the Langley Heritage Centre to engage in cross packaging and marketing with local heritage, wine, culinary, agritourism, arts and outdoor organizations as well as Aboriginal partners.

1.3 Langley Tourism Market

1.3.1 Available Market

The resident visitor market for the new Langley Heritage Centre is defined as including the residents of the Fraser Valley and the Greater Vancouver Regional District (GVRD). The visitor market is defined as all overnight visitors to Vancouver. **Exhibit 1.2** shows the total available resident and overnight visitor market for the Langley Heritage Centre, estimated at 10.7 million in 2003. Non-

resident visitors comprise 73.9%, non-school aged residents 19.4% and school aged residents 6.7% of the market. It is forecast that this market will increase to 12.1 million by 2009.

Exhibit 1.2: Total Available Market (2002 - 2008)

Market Size by Origin	Actual	Forecast					
	2003	2004	2005	2006	2007	2008	2009
Residents¹							
- Residents (net) ²	2,083,036	2,122,314	2,159,661	2,197,454	2,235,700	2,274,408	2,313,583
- School aged ³	321,302	318,089	314,908	311,759	308,641	305,555	302,499
<i>Subtotal Local Population</i>	<i>2,404,338</i>	<i>2,440,403</i>	<i>2,474,569</i>	<i>2,509,213</i>	<i>2,544,342</i>	<i>2,579,963</i>	<i>2,616,082</i>
Visitors							
Visitor levels							
- Overnight visitors ⁵	7,922,242	8,159,909	8,404,707	8,656,848	8,916,553	9,184,050	9,459,572
TOTAL AVAILABLE MARKET	10,726,021	10,600,313	10,879,276	11,166,061	11,460,895	11,764,013	12,075,654

^{1/} Includes Fraser Valley and GVRD Residents

² Excludes School Age Children

Source: Review of GVRD, BC Health Ministry, BC Education Ministry & Tourism Vancouver data

When the detail on the available market is examined, it can be noted that there is a good sized resident population which is forecast to continue increasing. It is anticipated that the total population will grow from 2.4 million in 2003 to 2.6 million by 2009.

Vancouver receives approximately 8.4 million overnight visitors annually. No data are available on the total number of day visitors received. Overnight visitor numbers are forecast to increase slightly for 2004. Average annual growth of 2% is anticipated for 2003 and about 3% the following three years. The total number of overnight visitors is forecast at 9.4 million in 2009.¹

1.3.2 School Market

Lower Mainland School Market

Exhibit 1.3 shows that the enrolment of school districts located within close proximity to Langley was 321,302 in 2003/2004. It also shows that the total enrolment fell slightly between 2002/2003 and 2003/2004, a trend that is expected to continue. Visitation potential for the new Heritage Centre is greatest from school groups from those districts nearest to Langley. These districts are Langley, Surrey, Coquitlam, Maple Ridge/Pitt Meadows, Mission and Chilliwack. Collectively, there were 151,256 students enrolled in these districts in 2003/2004.

¹ An average annual growth rate of 3% is applied to the overnight visitor market. This growth rate is likely too low for the years immediately prior to the Olympics in 2010, however no projections are available for beyond 2006 at this time.

Exhibit 1.3: School Market (2002/2003 - 2003/2004)

District	Total Enrolment	
	2002/2003	2003/2004
Abbotsford	19,924	20,090
Burnaby	24,543	24,597
Chilliwack	12,903	12,794
Coquitlam	33,159	32,383
Delta	17,446	17,426
Langley	20,216	20,041
Maple Ridge/Pitt Meadows	15,409	15,559
Mission	7,381	7,604
New Westminster	5,847	6,200
North Vancouver	18,401	18,132
Richmond	23,517	23,346
Surrey	62,114	62,875
Vancouver	56,878	56,554
West Vancouver	6,631	6,701
TOTAL	324,629	321,302

Source: BC Department of Education

Post Secondary, ESL and International Schools Markets

In addition to the Lower Mainland school market, other educational markets which should have a high level of interest in the Langley Heritage Centre include:

- The post-secondary educational sector. Within B.C. and the Lower Mainland, there is scope to develop programs and links that will appeal to departments such as agriculture, history and environmental sciences.
- Vancouver has become a recognised centre for language schools. It is estimated that there are at least 85 private language schools in the GVRD. According to the Canadian Association of Private Language Schools (CAPLS), in 2002 there were approximately 30,000 students enrolled in registered ESL programs in Vancouver at any one time. Koreans make up the largest group, with more than 10,000 students, and Japanese students comprise the second-largest group. Given that a number of unregistered schools exist, the actual number of ESL students is likely much higher. These students seek out opportunities to learn about the history and culture of Vancouver, B.C. and Canada, and are known to be interested in B.C. heritage and history.
- The international schools market is growing within the Lower Mainland and the Victoria region. Large tour operators such as JTB International offer school group field trips and have staff

specifically focused on this market. These groups travel in fairly large numbers with group sizes ranging from 100 to 200 students. As many as 10,000 Japanese students visit Canada annually, with a significant proportion visiting B.C., and Vancouver is a key gateway city.

1.3.3 Non-resident Visitor Characteristics

Insight into the market characteristics of visitors to Langley is provided by data collected by the Visitor Infocentres in Langley and Fort Langley and by visitor surveys conducted for the Village of Langley, Langley Centennial Museum and Fort Langley National Historic Site.

Visitor Origins

In terms of GVRD visitor origin, Canada is the most important source market (56.5%). B.C. (30.0%), Alberta (10.2%) and Ontario (7.8%) are the key provincial markets. The US is the second most important source market (28.5%), followed by Asia/ Pacific (9.3%) and Europe (4.3%). Washington and California, both at 7.2%, are the key individual US markets (**Exhibit 1.4**).

Exhibit 1.4: Market Origin of GVRD Visitors (2001 to 2003)

Origin	1999	2002	2003	2003 %*	Change 1999-2003*
Canada	4,784,717	4,705,731	4,643,673	58.3%	-2.9%
B.C.	2,527,218	2,497,101	2,466,526	31.0%	-2.4%
ON	880,732	848,507	838,095	10.5%	-4.8%
AB	651,350	651,410	639,692	8.0%	-1.8%
Other Canada	725,417	708,713	699,360	8.8%	-3.6%
U.S.	2,235,746	2,374,577	2,233,251	28.0%	-0.1%
WA	572,106	601,306	562,316	7.1%	-1.7%
CA	565,703	601,176	565,177	7.1%	-0.1%
Other West U.S.	519,311	551,576	518,911	6.5%	-0.1%
Other U.S.	578,626	620,519	568,721	13.9%	-1.7%
Asia/Pacific	737,819	776,213	620,201	7.8%	-15.9%
Japan	248,691	245,188	164,010	2.1%	-34.1%
Australia	86,043	86,181	92,974	1.2%	8.1%
South Korea	55,739	95,001	92,078	1.2%	65.2%
Other Asia/Pacific	392,309	349,843	271,139	3.4%	-30.9%
Europe	419,828	358,516	360,185	4.5%	-14.2%
UK	179,682	178,895	181,343	2.3%	0.9%
Other Europe	240,146	179,621	178,842	2.2%	-25.5%
Other International	108,110	106,646	109,888	1.4%	1.6%
TOTAL	8,347,153	8,321,683	7,967,198	100.0%	-4.6%

Meantime, visitor data from various sources indicate that compared to the GVRD as a whole, Langley draws mainly B.C. (particularly regional) and Canadian visitors and relatively few US or

European visitors. The exception is the Fort Langley Historic Site, which draws a very high percentage of European visitors and a significant percentage of US visitors (**Exhibit 1.5**).

Exhibit 1.5: Market Origin of Langley Visitors

Visitor Infocentres: 2003 ¹			Centennial Museum: 2003 ²		Ft Langley NHS: 2000 ³	
<i>Visitor Origin</i>	Ft Langley	Langley	<i>Visitor Origin</i>	%	<i>Visitor Origin</i>	%
Local Resident	50%	49%	Fraser Valley	42%	Canada Total	58%
Other BC	32%	32%	GVRD	31%	BC	78%
Alberta	7%	7%	Other BC	4%	AB & ON	16%
Other Canada	3%	3%	Other Canada	9%	Other Can	9%
US	6%	6%	US	7%	US	13%
Europe	2%	1%	Europe	4%	Europe	25%
Asia/Australia	0.4%	0.2%	Asia	3.0%	Other	2%

Note: Percentages may not add to 100% due to rounding

Sources: 1) Tourism BC, 2) Langley Centennial Museum, 2003. 3) Fort Langley NHS, 2000.

Length of Stay

Data on length of stay are summarized in **Exhibit 1.6**. These data indicate that the majority of visitors to Langley are on a day or overnight trip.

Exhibit 1.6: Length of Stay of Langley Visitors

Infocentres: 2003 ¹			Heritage Tourism Study: 2002 ²	
<i>Nights in Community</i>	Ft Langley	Langley	<i>Length of Stay</i>	%
Same day	33%	33%	1/2 day or less	78%
1	24%	25%	1 day or less	94%
2	15%	15%		
3	12%	12%		
4-6 (1 week)	9%	10%		
7-13 (2 weeks)	5%	4%		
14+	2%	1%		

Note: Percentages may not add to 100% due to rounding

Sources: 1) Tourism BC, 2002. 2) Village of Fort Langley, 2002.

Activity Preferences

Insight into the activity preferences of Langley visitors is provided in **Exhibit 1.7**. The data indicates that visitors are interested in visiting culture, heritage and nature attractions and experiences. Shopping, dining out, and visiting friends and family are other important activities.

Exhibit 1.7: Activity Preferences of GVRD and North Vancouver Visitors

Infocentres: 2003 ¹			Heritage Tourism Study: 2002 ²		Ft Langley NHS: 2000 ³	
Information Requested	Ft Langley	Langley	Planned Activities	%	Other Activities	%
Accommodation	18%	18%	Visit local shops	36%	Visit Vancouver	25%
Adventure/Recreation	11%	11%	Historic Ft Langley	28%	Shopping	24%
Attractions	15%	15%	Dine at restaurant	17%	Visit Friends/Family	19%
Events & Conferences	9%	9%	Visit museums	18%	Visit Parks	18%
Food & Beverage	8%	8%			Eat at restaurant	16%
Transportation	6%	6%			Gallery/Museum	7%
Shopping	6%	6%			Historic Site	3%
Parks	5%	5%			Picnicking	1%
First Nations	2%	3%			Other	13%

Note: Percentages may not add to 100% due to rounding

Sources: 1) Tourism BC, 2002. 2) Village of Fort Langley, 2002. 3) Fort Langley NHS, 2000.

1.4 Langley Heritage Tourism Destination Potential

1.4.1 Heritage Tourism Assets

The Langley area is a destination that provides visitors with the opportunity to have a unique, authentic heritage experience. The area has a rich agricultural background, and is home to Fort Langley National Historic Site. The historic Village of Fort Langley offers a variety of arts and heritage-oriented visitor attractions, including shops, restaurants and galleries.

Spending by overnight visitors to the Langley area was estimated at \$104.4 million in 2001. Cultural/heritage tourism accounts for 17% of this total and generates 130 full time equivalent jobs. The hours contributed by volunteers, whose donation of time is integral to the sector's financial performance, are valued at \$18.9 million in equivalent paid employee salary costs. These figures illustrate the importance of heritage tourism to the economy of Langley (Grant Thornton, 2003).

A cultural/heritage tourism inventory completed in 2003 found that the area's wealth of heritage tourism assets includes over 740 unique people, places, businesses, events, attractions, historic sites and organizations related to culture and heritage (Township of Langley, 2003). Of these, 64 have been identified as being core assets that attract visitors to the area and/or are important components in the overall visitor experience. These include the following (Grant Thornton, 2003):

- 6 Commercial Cultural Attractions, including the aggregate of shops and restaurants which comprise the Village of Fort Langley
- 17 Heritage Cultural Attraction and Historic Features, including the Langley Centennial Museum and the Fort Langley National Historic Site
- 3 Theatres and Venues
- 11 Art Galleries / Studios
- 27 Festivals and Events

Langley's many agritourism assets are an important category of heritage tourism assets. The cultural/heritage tourism inventory listed more than 40 agritourism assets, ranging from farms to vineyards and wineries nurseries, greenhouses, apiaries and gardens (Township of Langley, 2003). Other important tourism categories are First Nations culture and natural history, which could be showcased on-site and off-site by the new Heritage Centre via partnerships with groups such as the local Kwantlen First Nation and the Greater Vancouver Regional District Parks authority.

1.4.2 Relevant Agritourism Initiatives and Projects

The range of heritage tourism assets give Langley the product base necessary to become a agritourism destination, providing the Heritage Centre with a significant comparative advantage. In order to better assess how these assets could be used to enhance the concept for the Heritage Centre such that it becomes a venue where visitors can learn about Langley by participating in a variety of agritourism and heritage tourism programs and activities that take place not only at the facility but throughout the community, research on relevant heritage tourism and agritourism initiatives and projects was conducted. Although none of these initiatives are directly comparable to the Langley situation, they provide insights which assist in developing and refining the proposed concept for the new Heritage Centre.

These initiatives and their relevance to the Langley Heritage Centre concept are reviewed below:

Copia Cultural Centre and Museum. Located in Napa in California's Wine Country, Copia is a cultural centre and museum named for the Goddess of Abundance and whose mission is to investigate and celebrate the culture of the collective table through wine, food and the arts. Originally inspired by famed vintner Robert Mondavi's vision of a place that would celebrate wine, food, and the arts, COPIA explores the world of wine, food and the arts through a variety of interactive experiences including exhibitions, performances, tastings, classes, and other programs. The facility comprises galleries, classrooms, gardens, and theatres. Programs and exhibits change frequently and revolve around monthly regional or cultural themes. Programs include food preparation and tasting classes, wine programs, arts, film, music and horticulture programs. A Legacy Artist-in-Residence program brings in well-known winemakers, chefs, scholars and artists for specialized classes and programs. Julia's Restaurant - named in honor of world-famous chef Julia Child, who acted an advisor to Copia – and a café offer visitors a choice: to dine in style or picnic on local foods. The Cornucopia gift shop offers food-related products, including locally produced preserves, autographed cookbooks, garden implements, and artworks for the table.

Copia is a refined, high class concept which is very different from the homey, warm, community-oriented approach proposed for the new Langley Heritage Centre. However, it is instructive in that it

illustrates how the food and cuisine theme can be used as a foundation for developing visitor activities and programs.

St. Jacobs County. The Village of St. Jacobs is located in south central Ontario, 75 kilometres from Toronto. Populated with many Old Order Mennonite farmers who retain the religion, customs and lifestyle of their 19th century forefathers, St. Jacobs welcomes more than 1.5 million visitors each year. The combination of interest in the unique history of the Mennonites and the region's variety of unique rural flavoured food and shopping experiences has dramatically increased visitation to the area over the past 20 years and made St. Jacob's country one of Ontario's most popular tourism destinations. Tourism growth has resulted in development of a Best Western hotel and other accommodation properties. Visitor experiences include learning about the Mennonite story, and visiting a Maple Syrup Museum, specialty and antique shops, a year-round farmers market, theatre and other cultural performances. Outdoor recreation includes trail riding, fishing and hiking.

The St. Jacobs County example demonstrates that communities located near to large urban centres and which have retained their rural flavour and offer a range of agritourism attractions can become popular tourism destinations. St. Jacobs' critical attributes include: location near to a major population centre (Toronto); a uniform rural, countryside theme reflected in the architecture of the village and tourism attractions and programs; the presence of primary built attractions (farmers market and museum); and, a range of heritage themed shopping, lodging, dining, theatrical and cultural attractions. The presence of similar critical attributes suggests that Langley has much potential to become a successful agritourism destination.

Marin Agricultural Land Trust. The Marin Agricultural Land Trust (MALT) was formed in California to focus on farmland preservation and includes ranchers and environmentalists among its members. The trust has an excellent program venue including hikes and tours, lectures and events, an art show and sale, and educational programs. All are oriented to Marin County farm and ranch life and provide an opportunity for visitors to experience the agricultural and cuisine character of the area. The hiking program is tied to specific agricultural operations, and most hikes include provision for food sampling, and/or cuisine as part of the experience. These programs have become so popular that they are no longer promoted in newspapers and other media but rather depend primarily on word of mouth advertising. Lectures and events programs focus on such topics as sustaining agriculture in Marin County, the history and culture of the County, advocacy topics around agriculture and ranching, and such events as harvest days. Education programs include summer institutes that help teachers understand Marin County agriculture and introduce them to agricultural curricula centered on local agriculture as well as field trips and other programs that provide a full gamut of opportunities for the area's teachers and school children. Marin Food System Project works with the local school system to introduce locally-produced foods into school food service programs as well as integrating agriculture, nutrition, and horticulture into educational programming.

The MALT example illustrates the range of public education programs that could be offered by the Langley Heritage Centre and Langley farms and businesses as well as the important role such programs can play in promoting agricultural land conservation and the healthy community values and lifestyles of the Township.

Touring Programs. There are a variety of touring programs promoting exploration of agricultural areas in Canada and the US. Like Langley's Heritage Centre, the participants in the programs are

enthusiastic about sharing their appreciation of agricultural roots and rural community life. Brief descriptions of these and other touring programs are found in Appendix 2. They include:

- **Ryder Lake Ramble in Chilliwack**, a one-day self-guided tour of 15 sites including farms with unusual animals, exceptional and unique gardens, peaceful woodland trails, panoramic vistas, and much more. It is marketed as an experience that provides the opportunity to "reconnect with the country".
- **Country Soul Stroll in Alberta**, a self-guided driving route through the Sturgeon County countryside and its neighbouring communities. Showcasing more than 16 agricultural sites, activities range from farmers markets to farm visits.
- **Cowboy Country in Alberta**, a historic 700 km cowboy trail along Highway 22. It provides western vacations including a guest ranch stay, farm and ranch vacations, horseback trail rides, pack trips, rodeos, festivals, a pow-wow and western and wilderness accommodation.
- **Taste Trail, Prince Edward County in Ontario**, is designed to encourage cuisine and agriculturally-themed experiences throughout Prince Edward County offered through restaurant, farm and other venues. It includes a taste trail web site and a theme and guide book with supporting road signage.
- **Sonoma County Farm Trails in California**, promotes member products and on-the-farm experiences based on maps and guides that facilitate independent exploration of Sonoma County.

The touring initiatives reveal the following points relevant to the Langley Heritage Centre:

- The initiatives are partnership based and are comprised of an array of private and public stakeholders. These include arts, culture and heritage tourism enterprises, farmers, municipalities, provincial governments, the federal government, Community Futures, economic development organizations, trade associations, suppliers, academic institutions, and national, provincial, regional and local tourism destination marketing organizations.
- The programs weave together the arts, heritage and agritourism experiences found in a given city or region. The result is an array of multi-faceted experiences that highlight and celebrate a region's unique history and culture, and which can be branded and marketed to culturally oriented travellers.
- The partnerships are positioned to take advantage of the arts and heritage tourism market, one of the fastest growing segments in the American travel industry. Travellers comprising this market segment are typically baby boomers who are well educated, well off financially and typically spend more per day than other travellers.
- They allow the participants to access new markets, boost destination profile and awareness, and increase the overall appeal and draw to a region - ultimately resulting in increased economic activity that benefits the entire region.

1.4.3 Response to the Langley Heritage Centre Concept

In order to assess potential support from the tourism industry and markets, interviews were held with representatives of relevant government departments and tourism industry organizations. Appendix 3 provides a list of the travel trade and tourism industry organizations interviewed.

The key outcomes of these interviews are summarized in this section.

Response from Government

Interviews were held with BC Ministry of Agriculture representatives to determine their views on the project and how it might fit with government objectives for facilitating a sustainable agriculture sector. The BC Ministry of Agriculture has already established a partnership with the agriculture industry and Tourism BC to foster agri-tourism and the degree to which the Heritage Centre concept might fit that initiative was also important to determine. The Ministry has also provided a staff member on a secondment to Tourism BC to work with the tourism agency to develop chef training and cuisine programs.

Ministry representatives expressed enthusiasm for the project, noting that it offered a potential agri-tourism product that, at the concept level, fit well with their agri-tourism initiative. Moreover, they observed that if any community in the Lower Mainland were to pursue such an initiative, Langley was the obvious candidate given its agricultural diversity. An important feature of the concept, from an agriculture perspective, is the links proposed between local cuisine, the sale of local agricultural product at the Heritage Centre, and the opportunity to explore Langley's many agriculture experiences. Ministry representatives suggested those links should be of real interest to industry, not just from Langley's perspective but also for industry throughout the Lower Mainland. It was observed that this could be another marketing channel for the Buy BC program and, by featuring a changing local cuisine experience based on the seasons, would enable coverage of the full range of local agricultural products.

Also discussed was the potential to use the "Taste of BC" brand or word mark for the local cuisine experience ("community lunches") proposed for the Heritage Centre. Ministry representatives were not sure of the status of the brand and have agreed to research its current legal status. They concurred that such a brand would be a good complement to the Buy BC theme of the local cuisine experience and "fits" the concept well. In this regard, the Ministry observed that educational programs might also be considered for the concept. They noted their work training related to local BC products and suggested that the Langley concept would be an excellent complement to their efforts.

Finally the Ministry representatives suggested that engaging the Ministry and the agricultural industry further would be useful to explore the partnership potential. This includes determining how the concept might partner with the Buy BC program, a presentation to the BC Agri-tourism initiative Board to discuss support potential and complementary programs, introduction of the concept to the BC Agricultural Council and resolution of the potential use of the "Taste of BC" brand.

Response from the Tourism Industry

Interviews were held with the Destination Management Organizations (DMO) relevant to Langley tourism product development and marketing, including Tourism BC, Tourism Vancouver and Vancouver Coast and Mountains Tourism Region. In addition, an interview was conducted with a representative of the British Columbia AgriTourism Alliance (BCATA). The BCATA is a provincial

society which is akin to a DMO in that it is charged with providing strategic leadership to the agritourism industry. It is comprised of industry stakeholders and private sector organizations with long-term interests in the development of a sustainable agritourism sector in BC, and has a number of agritourism product development and marketing programs. It receives support from a government liaison group headed by the Ministry of Agriculture, Food and Fisheries with representation from Tourism BC.

To gauge the travel trade response to the Heritage Centre project concept, interviews were also held with representatives of tour operators, receptive tour operators, local sightseeing companies and destination management companies serving the Lower Mainland region.

All of DMO representatives consulted felt that the concept fits well with Langley's existing tourism assets and has tremendous potential. Every one of them expressed willingness to work with the Township of Langley to develop the Langley Heritage Centre and the area as a tourism destination. Importantly, the BCATA indicated that financial support might be possible given that the Heritage Centre concept had the potential to become a model for agritourism development in other communities.

The tour operators were also enthusiastic about the concept, and all of those interviewed indicated they would be willing to provide further input into product development and marketing as the project progresses.

Although all of those interviewed provided strong support for the concept, they stressed that the Heritage Centre/Township's ability to draw visitors from outside the Fort Langley area is highly contingent on the adoption of a destination tourism orientation. The entire Langley area must be marketed as a single destination if it is to achieve the success of other agritourism destinations such as St. Jacob's County. The destination approach would involve developing yearly cooperative marketing plans and budgets. The Township would work closely with the DMOs (including Mighty Fraser Country and DMOS in Chilliwack, Hope and other neighbouring communities), the travel trade and the travel media to reach tourism markets. Regional visitors and the local population would be targeted with a variety of cooperative advertising, marketing and public relations programs.

The interviews provide useful insight into product development and suggest:

- Tour operators would be interested in packaging the Heritage Centre/Township as either a day-time activity or even a late afternoon – evening tour.
- Themed evenings and spousal programs (including tour & meal events) for the 'meetings & conferences' market will appeal to destination marketing companies.
- Creation of a full slate of agricultural and heritage events, festivals and activities suitable for both groups and independent travellers is essential. If tour operators are to promote Langley as a destination, they must know the Heritage Centre and area partners will deliver those activities on a regular schedule, no matter how small the group.
- Packages incorporating water based interpretive experiences are of interest to leisure, corporate and educational markets. The Fraser River has a fascinating history and programs allowing visitors to learn about the history of the region from a water based perspective are very appealing.

- Education programs for teachers, school children, ESL students and other groups also have significant potential as do weekend getaways packages for Lower Mainland residents and their families.
- The Heritage Centre/Township also has potential to develop as a location for BC's growing film industry.

Other suggestions made by the tourism that were seen as instrumental to making the Heritage Centre/Township a "must go to" destination are:

- Begin by concentrating on building the local market. The local and regional population must embrace the Heritage Centre/Township and become its 'ambassadors.' If the local market loves visiting Langley, they will tell others and bring family and friends. As was the case in St. Jacobs, local market popularity will generate interest among visitors and they will start to ask for the product, which will cause tour operators to package and market the destination.
- Joint ticketing with Fort Langley is highly recommended. Visitors should have the opportunity to purchase an admission ticket which allows them to visit both attractions, and perhaps the BC Farm Machinery and Agriculture Museum, for a reduced price.
- Given Langley's distance from downtown Vancouver and other Lower Mainland communities, provide creative and collaborative transportation arrangements for residents and visitors. Consult with Translink and private sector transportation providers to identify possibilities for providing convenient, affordable transportation options for accessing the Heritage Centre. For example, providing transportation on the West Coast Express was suggested. Partnerships with firms operating paddle wheelers and whale watching boats should be explored.
- Promote Langley's expanded Heritage Centre concept as a feature destination on the Heritage Discovery Route, a new circle tour route being developed in partnership with Tourism BC and the Ministry of Transportation.
- Explore options that would allow the facility to handle larger convention groups. The expansion of the Vancouver Convention and Exhibition Centre will triple its events capacity by 2008. There are a limited number of facilities available for interesting themed evening functions, and many groups are interested in options offering a local experience and of a more casual nature. There is significant potential for the Langley Heritage Centre to enter this market space. Given that the much of the meeting and convention business occurs during the summer and shoulder tourism seasons, themed evenings could be accommodated in large outdoor tented structures.
- Partner with the Vancouver Coast and Mountains and Mighty Fraser Country for regional packaging and marketing. These partnerships will be a key strategy for encouraging visitors to Vancouver who are travelling by private vehicle to include a stay in the Langley region, rather than simply passing through on their way to or from the Interior, the Okanagan, the Rockies or other Northwest tourism destinations. For example, packages could be created in association with such well-known hotels such as the Harrison Hotsprings Hotel that would result in marketing benefits for the Heritage Centre.

1.5 Market Assessment Conclusions

The global, national and provincial trends discussed reveal that culture and heritage tourism are among the hottest global tourism trends of the 21st century and that B.C. provides a welcoming environment for museums. The market assessment for the new Langley Heritage Centre also shows that the proposed facility is located within an area that has a large and growing population and a large tourism sector, providing a solid potential market base. The available market is in the order of about 8 million visitors per year to Vancouver and about 2.5 million residents. These figures suggest that there is considerable potential to achieve much higher visitor numbers than are being reached by the Langley Centennial Museum or other Langley attractions, including Fort Langley. Further, the upcoming Olympics will generate an even larger visitor market and provide the opportunity for GVRD communities to showcase their unique attributes to visitors.

The Langley area has many diverse arts and heritage activities, which are key attractors for current visitors. This finding together with the overviews of the overall and niche cultural and heritage tourism markets illustrate that the new Heritage Centre is well positioned to take advantage of current tourism trends. The Centre has the potential to appeal to regional, national and international visitors and to be the icon tourism product Langley is currently lacking. However, given Langley's relatively distant location and its lack of profile as a tourism destination, it will be difficult to attract national and international visitors or even a higher number of regional visitors if this is all the destination has to offer. Only the most avid cultural and heritage traveler (and that is a small number) will travel a long distance to experience a Heritage Centre. Therefore a destination orientation which focuses on Langley's unique travel generators and offers the customers a variety of activities is essential to the success of the Heritage Centre.

Key among the existing travel generators Langley has which could attract visitors from the region and overnight visitors to BC are Fort Langley and the "rural village" character of the town. Positioning the new Heritage Centre around these travel generators and complementary arts and heritage tourism themes, particularly agritourism and wine and culinary tourism, could work very well. Programs focussed around food and cuisine, including specialty events/festivals/themes weeks or months hold particular promise. These specialty elements could be combined with arts and heritage programs to explore Langley as well as shopping, cuisine and performing arts, would provide the potential to significantly increase tourism to the region as well as providing strong visitation to the new Heritage Centre.

Case studies of other initiatives and programs provide insight into how Langley businesses could partner to develop and market exciting agritourism and heritage tourism products that would appeal Langley area and other Lower Mainland residents and international visitors. These case studies also reveal that destination and partnership approaches to tourism provide many economic and social benefits to the communities involved.

Interviews with government and tourism industry representatives show that financial and other forms of support are highly possible, while consultations with tourism industry representatives reveal that there is considerable market interest in the new Langley Heritage Centre concept. Indeed, the BC Ministry of Agriculture representatives have suggested that the concept, with its local cuisine component in particular, could attract partnerships from government and the agricultural industry. Their cooperation is reflected in research they are undertaking related to the "Taste of BC" brand to determine whether and under what circumstances the Heritage Centre concept might incorporate it. They also recommended a number of next steps to explore partnership potential for the concept with

the agricultural industry and offered to facilitate this effort once they have reviewed the concept in more detail.

In conclusion, the market assessment for the new Langley Heritage Centre concept is very positive, illustrating that the concept has the potential to transform Langley into a vibrant, community-centred tourism destination.

APPENDIX 1

Arts, Culture and Heritage Tourism Markets

Canadian Participation in Heritage Activities

Until recently, there has been relatively little detailed information available on the domestic demand for Canadian arts, culture and heritage products and services. This situation has changed following the addition of two Culture Supplements to Statistics Canada's 1992 and 1998 General Social Survey. Fortunately, these supplements collected particularly detailed information on Canadians' participation in arts, culture and heritage activities. The data collected has provided the basis for identifying national and provincial participation rates for a range of arts, culture and heritage activities as well as providing comprehensive socio-demographic information useful for audience development and marketing insight and planning. This section begins by reviewing the relevant key findings of reports examining the national and provincial trends in culture and heritage participation in Canada in the 1990s, as identified through the two Cultural Supplements. It then goes on review relevant recent research on culture and heritage participation in the Greater Vancouver Regional District, with particular emphasis on the Langley situation.

National Market

Attendance

The estimated total number of Canadians attending museums and arts galleries increased between 1992 and 1998. Museums and art galleries drew 7.8 million Canadians in 1998, a healthy increase of 12.3 percentage points compared to the 7.0 million attendees in 1992 (Hills, 2004a).

Although overall attendance numbers were higher, the percentage of Canadians attending museums and art galleries remained stable. Within the museums category, public art museums and galleries were the biggest winner with a 4.4 percentage point gain between 1992 and 1998. On the other hand, general, history and community museums saw a significant drop of 2.6 percentage points during this period. Science, technology and natural history museum attendance remained stable (Figure 1.1).

Figure 1.1: National Heritage Attendance Rates by Activity (Percent)

Activity	1998			1992 Total ²	Chg 1992 to 1998 Total ²
	Male ¹	Female ¹	Total ²		
Population 15 yrs+ (thousands)	11,937	12,323	24,300	21,300	14.1
<i>Any Museum or Art Gallery</i>	29.3%	30.1%	32.3%	32.7%	-0.5%
Public art museums, art galleries	21.4%	22.8%	24.0%	19.6%	4.4%
Science, technology & natural history museum	13.2%	8.7%	14.0%	13.6%	0.4%
General, history or community museum	10.9%	10.9%	11.8%	14.4%	-2.6%
Commercial art gallery	8.3%	8.5%	9.2%	8.5%	0.8%

Sources: 1) Statistics Canada, 1998. 2) Hills, 2004a.

Interest Overlaps with Other Markets

Notably, the research shows that Canadian museum attendees share many interests with performing arts and art gallery attendees, including their tendency to attend cultural festivals and be active in sports and volunteerism. About 60% of museum visitors are likely to attend performing arts events. Similar to performing arts and public art gallery visitors, around four in ten of adult museum visitors are likely to attend cultural festivals, close to five in ten participate in sports and over 45% volunteer with a community organization (Figure 1.2). In all cases, these participation rates are much higher than the rates of Canadians who do not attend museums.

Figure 1.2: Interest Overlaps – Participation Rates by Activity – 1998 (%)

Activities	Museum Visitors	Performing Arts Visitors	Public Art Gallery Visitors
Performing arts events	60.3%	100.0%	64.9%
Museums	100.0%	n/a	n/a
Art galleries	n/a	41.4%	100.0%
Cultural festivals	40.3%	40.9%	43.2%
Sports participation	46.4%	47.1%	47.4%
Volunteer participation	47.3%	45.6%	47.4%

Sources: Hills, 2004a; Hills, 2004b.

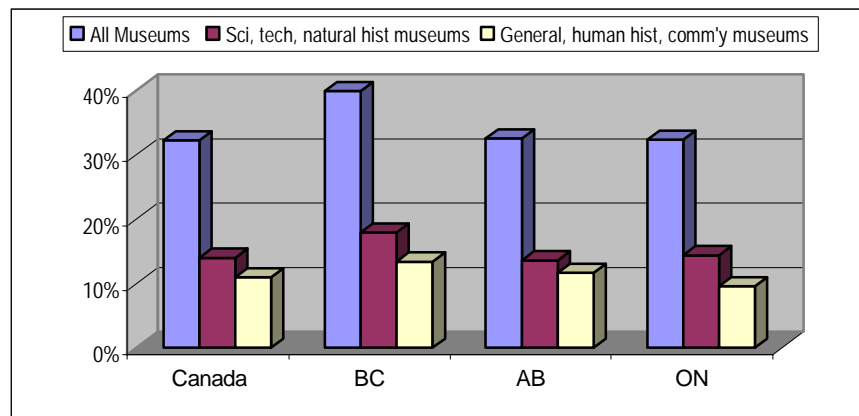
Unfortunately there are no verifying data available, but other overlaps seen among these market segments strongly suggests performing arts and public art gallery visitors are likely to also visit museums.

B.C. Market

Attendance

Figure 1.3 shows the museum attendance rates for Canada and B.C. as well as Alberta and Ontario, which are the key domestic tourism source markets for Vancouver. It reveals that about 40% of B.C. residents and over 30% of Alberta and Ontario residents visited a museum of some type in 1998. It also shows that B.C.'s museums attendance rates exceed the national average and those of Ontario and Alberta in every museum category. Indeed, although not all provinces' data is shown here, B.C. has the highest attendance rate in Canada. Science, technology and natural history museums are considerably more popular than are general, human history and community museums among residents of all three provinces.

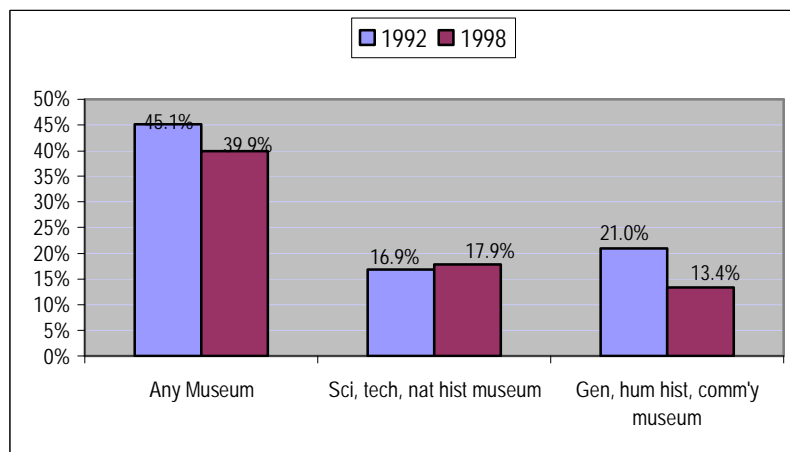
Figure 1.3: National and Provincial Museum Attendance Rates – 1998 (%)



Sources: Hills, 2004a; Hills, 2004b.

Overall museum attendance by B.C. residents decreased by 5.2 percentage points between 1992 and 1998. Although science, technology and natural history museum attendance remained roughly the same, attendance for general, human history and community museums dropped dramatically (7.6 percentage points) (Figure 1.4).

Figure 1.4: B.C. Residents' Museum Attendance Rates – 1992 & 1998 (%)



Sources: Hills, 2004a; Hills, 2004b.

Although less information is available at the provincial level, the available data suggests that, similar to the national scene, B.C. performing arts, art gallery and museum attendees share common interests. More than half of performing arts attendees visit art galleries and nearly six in ten museum visitors attend performing arts events. About one third of performing arts and museums attendees go to cultural festivals and around 50% of both segments participate in sports. At rates of over 50%, volunteerism is even more prevalent among B.C. performing arts and museum attendees than at the national level (Figure 1.7).

Figure 1.7: Activity Overlaps: B.C. Attendance Rates by Activity – 1998 (%)

Activities	Performing Arts Visitors	Museum Visitors
Performing arts events	100.0%	59.1%
Museums	n/a	100.0%
Art galleries	50.4%	n/a
Cultural festivals	32.9%	31.0%
Sports participation	50.9%	46.1%
Volunteer participation	54.6%	50.7%

Sources: Hills, 2004a; Hills, 2004b.

Participant Profiles

Based on participation rates, Figure 1.3 provides the comparative demographic characteristics of all Canadians and of B.C. residents who visited museums in 1992 and 1998. Given that B.C.'s overall museum attendance rate is 7.6 percentage points higher than the overall Canadian museum attendance rate, it follows that the provincial attendance rates are higher than the national averages for all indicators. However, there are a number of instances where the provincial and national attendance rates are either significantly higher or lower than 7.6 percentage points. Instances where differences of more than two percentage points exist between the B.C. and national rates and other notable findings are as follows:

- **Gender** – While there were virtually no gender differences in national attendance rates, the data shows that women in B.C. display considerably higher museum attendance rates than their male counterparts.
- **Age** – At both the national and provincial levels, museum attendance rates are virtually identical across all age groups, with the exception of considerably lower attendance rates among seniors.
- **Education** - Education levels are highly correlated with attendance rates at museums. More than half of Canadian adults and nearly six in ten B.C. residents with university degrees visit museums. At the other end of the scale, only about 20% of Canadian adults and three in ten B.C. residents visited a museum in 1998. B.C. residents with a high school education are much more likely to visit a museum while those with some post secondary education are much less likely to visit a museum than are all Canadians who have attained these respective education levels.
- **Household income** – Museum attendance rates also increase in direct relation to income. Around 50% of Canadians and 57% of B.C. residents in the highest income bracket (\$80,000+) visit museums. Meantime, only 22% of Canadians and 32% of B.C. residents in the lowest income bracket (less than \$20,000) reported visiting a museum in 1998. Attendance rates are generally strongest in the above \$40,000 income brackets, but attendance rates among B.C. residents in the \$60,000 to \$79,999 bracket are much higher than the national average. Meantime provincial attendance rates within the \$20,000 to \$39,999 bracket are much lower than the national average.
- **Marital status** - Canadian adults who are single appear to be somewhat more likely to visit museums than are married or common law couples. In B.C., marital status does not appear to be a predictor of museum attendance.

- **Household composition** – Although the differences are slight, B.C. residents with children at home are more likely (40.7%) to attend museums than those without children (39.5%). This is different from the national situation where Canadians with no children at home (32.7%) were more likely to attend museums than were those with children (31.6%).

Figure 1.3: National & B.C. Resident Museum Visitor Profiles – 1998 (%)

Indicator	National	BC	% Rate Difference
Population 15 yrs+	24,300,000	3,200,000	--
Visit any Museum	32.3%	39.9%	7.6%
<i>Gender</i>			
Female	32.8%	42.5%	9.7%
Male	31.7%	37.3%	5.6%
<i>Age</i>			
15 to 29 yrs	34.0%	41.7%	7.7%
30 to 44 yrs	34.0%	41.7%	7.7%
45 to 59 yrs	34.5%	42.1%	7.6%
60+ yrs	24.3%	32.3%	8.0%
<i>Education</i>			
Less than high school	19.2%	27.8%	8.6%
High school	24.1%	35.1%	11.0%
Some post secondary	37.3%	40.8%	3.5%
College/ trade diploma	33.2%	41.8%	8.6%
University degree	53.0%	59.1%	6.1%
<i>Household Income</i>			
Less than \$20,000	21.8%	31.7%	9.9%
\$20,000 to \$39,999	28.2%	31.8%	3.6%
\$40,000 to \$59,999	34.3%	41.0%	6.7%
\$60,000 to \$79,999	37.8%	52.0%	14.2%
\$80,000 plus	48.6%	56.5%	7.9%
<i>Marital Status</i>			
Single	35.9%	40.1%	4.2%
Married	30.6%	40.2%	9.6%
Common law	32.1%	40.8%	8.7%
<i>Household Composition</i>			
Children at home	31.6%	40.7%	9.1%
No children at home	32.7%	39.5%	6.8%

Sources: Hills, 2004a; Hills, 2004b.

GVRD and Langley Region Market

Attitudes and Attendance

The results of a survey conducted in 2000 by the Greater Vancouver Regional District (GVRD) indicate that arts and heritage activities are considerably less important on a personal basis for Langley region residents than they are for GVRD residents overall. While 34% of GVRD residents stated that arts and heritage activities are important for them personally, only 23% of Langley region residents felt the same (Figure 1.4).

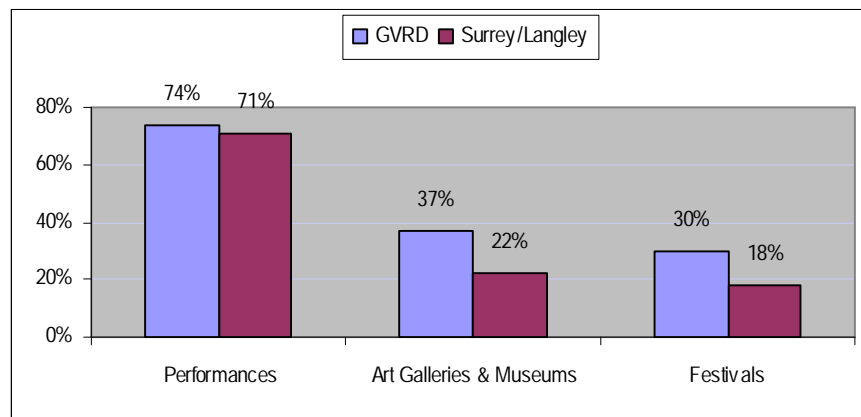
Figure 1.4: GVRD & Langley Region Residents Attitudes – 2000 (%)

Importance Rating	Importance to Respondent		Importance to Community	
	GVRD Residents	South of Fraser/ Langley Residents	GVRD Residents	South of Fraser/ Langley Residents
Important	34%	23%	42%	42%
Somewhat important	30%	29%	47%	43%
Somewhat	25%	34%	8%	4%
Not important	9%	6%	1%	1%

Source: Canadian Facts, 2000.

Given their attitudes, it is not surprising that Langley region residents are less likely to attend museums or other arts and heritage events and attractions than are GVRD residents overall. In 1996/97, nearly twice as many GVRD residents as Langley region residents visited a museum or art gallery (37% vs. 22%, respectively). Similarly, festival attendance rates much lower among Langley residents (18%) than GVRD residents (30%). Although the differences are less pronounced, Langley region residents (71%) also are less likely to attend performances than are GVRD residents overall (75%) (Figure 1.5).

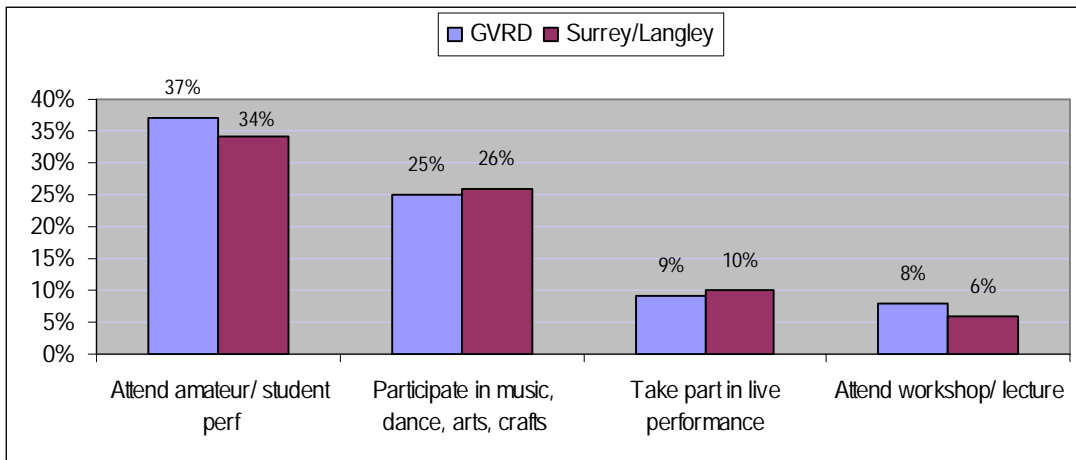
Figure 1.5: GVRD & Langley Residents Attendance by Type of Activity (%)



Source: Canadian Facts, 1997.

Data on passive and active involvement in other arts and culture activities suggests that Langley region residents are just as likely as GVRD residents to support locally produced events and those activities that allow them to be participants rather than just being spectators. Langley residents attendance rates for amateur and student theatre performances and for workshops/lectures are similar to GVRD residents overall. They have slightly higher participation rates than do GVRD residents overall for music, dance, arts, crafts and live performance activities (Figure 1.6).

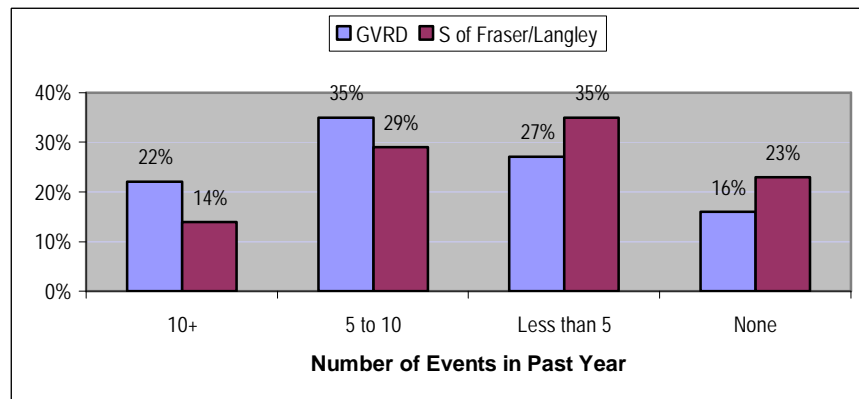
Figure 1.6: GVRD & Langley Arts & Culture Involvement - 1996/97 (%)



Source: Canadian Facts, 1997.

Langley region residents attend arts and heritage events and attractions much less frequently than GVRD residents overall. Only 14% of Langley region residents versus 22% of GVRD residents attend more than ten events annually. Nearly one quarter (23%) of Langley residents had not attended any events in the past year, a considerably higher figure than the 16% of GVRD residents that had not attended any event (Figure 1.7).

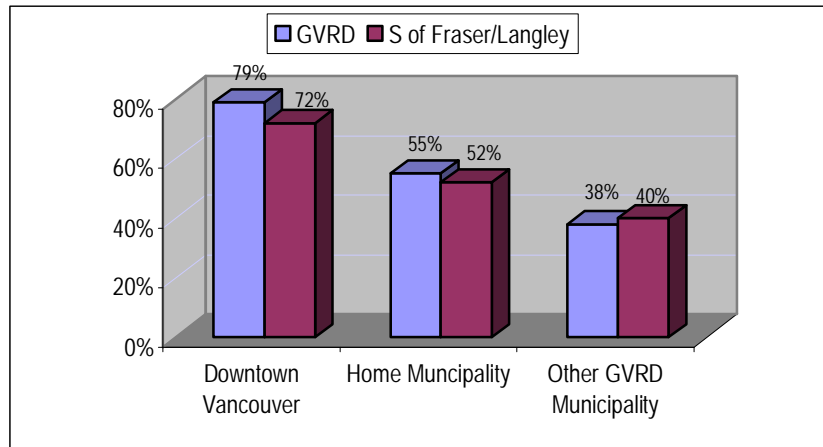
Figure 1.7: GVRD & Langley Residents Attendance by Frequency - 2000 (%)



Source: Canadian Facts, 2000.

Downtown Vancouver is a popular arts and culture destination for about three quarters of both GVRD residents overall (79%) and Langley region residents (72%). About half of Langley region (52%) are likely to attend an arts and culture event or attraction in their home municipality and one in four go to another GVRD municipality (Figure 1.8).

Figure 1.8: GVRD & Langley Residents Attendance by Location – 2000 (%)

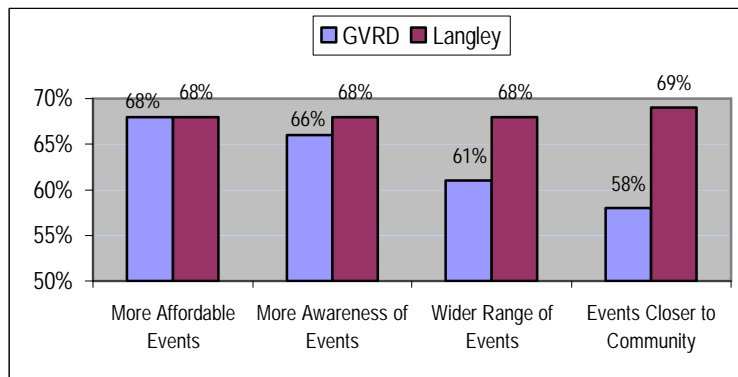


Source: Canadian Facts, 2000.

Factors Affecting Attendance

A number of factors have been identified which if addressed have the potential to increase arts and heritage attendance. The four key factors identified are: more affordable events; more awareness of events; a wider range of events, and; more events closer to your community. The first three of these are more or less equally relevant for Langley residents and GVRD residents overall. However, having more events closer to the community is much more important for Langley residents (69%) than the GVRD overall (58%) (Figure 1.8).

Figure 1.8: Factors for Increasing GVRD & Langley Residents Attendance – 2000 (%)



Source: Canadian Facts, 2000.

Participant Profiles

There is no comprehensive data on the profiles of Langley residents who attend arts and culture events and attractions. One recent study did provide age and education related information for GVRD residents. It suggests that GVRD residents of all age categories are less likely than B.C.

residents to visit such art galleries and museums, and that their attendance rates are closer to the national averages revealed by Statistics Canada's General Social Survey, as discussed above (Figure 1.9).

When it comes to education, the findings of the same study suggest that art gallery and museum attendance rates among GVRD residents with university degrees are about the same as the provincial and national averages discussed above. Meantime, the attendance rates for GVRD residents of other education levels appear to fall somewhere between the provincial and national averages (Figure 1.9).

Figure 1.9: GVRD Participant Profiles by Activity – 1996-1997 (percent)

	Professional Performances	Art Galleries & Museums
<i>Age</i>		
16 to 34 yrs	78%	30%
35 to 54 yrs	76%	39%
55+ yrs	62%	29%
<i>Education</i>		
Less than high school	61%	19%
College	79%	30%
University	81%	56%

Source: Canadian Facts, 1997.

To compensate for the lack of profile data on Langley residents, it is useful to compare socio-demographic data for the two Langley communities with national and provincial data on museum heritage attendees. Based on Census data from 1996 and 2001, Figure 1.10 provides selected demographic data for Langley City and Langley District Municipality (DM). It reveals that Langley DM residents generally fit the general profiles of museum attendees. In particular, they are below the senior age category, well educated and have high household incomes, attributes which correlate with strong museum attendance. On the other hand, Langley City residents tend to have lower education and income levels and therefore are less likely to visit museums (Figure 1.10).

Figure 1.10: Langley Community Profiles

	GVRD	Langley City	Langley DM
Population			
1996	1,831,665	22,520	90,685
2001	2,041,400	24,673	80,180
Gender (2001)			
Female	50%	53%	51%
Male	48%	47%	49%
Age (2001)			
0 to 14 yrs	9%	18%	22%
15 to 24 yrs	7%	14%	14%
25 to 44 yrs	15%	31%	29%
45 to 64 yrs	12%	22%	25%
65+ yrs	5%	15%	11%
Education (2001)*			
Up to High school	12%	14%	38%
Some post secondary	17%	16%	18%
College/ trade diploma	27%	17%	29%
University degree	23%	10%	31%
Household Income (1995)**			
Less than \$20,000	22%	16%	9%
\$20,000 to \$39,999	24%	26%	18%
\$40,000 to \$59,999	20%	25%	25%
\$60,000 to \$79,999	15%	18%	24%
\$80,000 plus	20%	15%	25%
Average Income	\$63,003	\$49,672	\$64,016

* Population 20 years and over

** Population 15 years and over

Sources: BC Stats, 2000/2001a & 2000/2001b; BC Stats, 2002a & 2002b.

Arts and Heritage Tourism

In 1998, the World Tourism Organization (WTO) first predicted that cultural and heritage tourism other closely associated forms of special interest tourism, such as nature tourism and thematic tourism, would be among the hottest trends of the 21st century (WTO, 1998). This prediction was recently confirmed by the Pisa Forum, an annual ‘think tank’ comprised of leaders of the global tourism sector. In its 2003 – 2004 report, the Pisa Forum noted that current market trends show that tourists are increasingly seeking experiential tourism offerings. Further, demand for authentic experiences which focus on local culture, learning, closeness to nature and wellness is on the rise, especially among older age groups (Express Travel and Tourism, no date).

The growing interest in arts and heritage tourism has sparked a number of recent market research studies relevant to the Langley Heritage Centre project. Among these are reports which focus on more broad based market segments. These reports include studies on two more broadly defined market segments:

- Historic/Cultural travellers – defined as travellers who tend to include some type of historical or cultural activities on their leisure trips
- Geotravellers – defined as consumers whose attitudes, behaviours and travel habits profiles show a high incidence of travel and a distinct preference for culturally and socially-related travel. They also tend to participate in educationally and socially oriented activities and are socially and environmentally conscious and active.

In addition, there are several studies which examine segments which are effectively subsets of the two broader market segments. These market subsets are:

- Heritage Tourism Enthusiasts - defined as those travellers who participate in multiple heritage oriented activities while travelling. Defining heritage activities include visits to general history museums, farmers’ fairs or markets, local festivals or fairs, science and tech museums, historic sites and historical replicas of cities/towns.
- Wine and Culinary Enthusiasts – defined as travellers who exhibit a particular interest in fine foods and wine while travelling. Activities these travellers typically participate in include touring a wine region, day visits to wineries, eating at gourmet restaurants and staying at an accommodation facility that includes a cooking school, wine tasting school or gourmet restaurant.

The following sections summarize and compare the market research findings on all of these market segments. The focus is on Canadian and American travellers, markets which the Canadian Tourism Commission has identified as the key source markets for Canadian arts and heritage tourism experiences and attractions over the shorter term (CTC, 1999).

In addition, brief overviews of three related niche market segments which have potential for the Langley Heritage Centre are provided. These segments are Learning and Enrichment Tourism, Agritourism and Aboriginal Tourism.

Arts and Heritage Tourism

Market Size

US and Canadian Markets

Globally, the World Tourism Organization estimates that 37% of all international trips include a culture/heritage component and that the market is growing at an annual rate of 15% (CTC, 1999).

Looking at the US market alone, the various recent market studies have produced the following estimates of overall arts, culture and heritage tourism market size as well as the sizes of subset markets:

- 81% of U.S. adults who travelled in the past year, or 118 million adults, are considered historic/cultural travellers. These travellers included historical or arts activities on almost 217 million trips in 2002, up 13% from 192 million in 1996 (TIA, 2002).
- TIA and National Geographic Traveler identified a consumer market of 55 million 'geotourists'. Within this larger market segment, are two subsets with particularly good potential for Langley arts, heritage and culture attractions (TIA and NGT, 2002):
 - Urban Sophisticates - 21.2 million adult travellers; more oriented to large city destinations and cultural experiences and attractions.
 - Geo – Savvys -16.3 million adult travellers; distinguished by their well-above interest in environmentally-oriented travel.
- 17%, or about 34.5 million American adults, are Heritage Tourism Enthusiasts. About one in four of these adults has travelled in Canada within the past two years, providing an estimated market of 8.3 million for Canadian heritage experiences attractions and products (CTC, 2002b).
- 21.6 million American adults (11% of total) are Wine and Culinary Enthusiasts. About one in four of these adults also has travelled in Canada within the past two years, providing an estimated market of 5.5 million for Canada's wine and culinary tourism experiences (CTC, 2003f).

In the case of Canada, the market size estimates are as follows:

- In 1999, Canadians took 16 million trips involving at least one heritage/cultural activity, representing 11% of all domestic trips (Statistics Canada, 2001).
- 11% of Canadians (2.6 million adults) are considered to be Heritage Tourism Enthusiast market. 80% of these individuals have taken a holiday in Canada the past two years, providing a total domestic market of about 2.2 million (CTC, 2002).
- The total Canadian Wine and Culinary Enthusiast market is estimated at 1.8 million adults. Of these, eight out of ten have taken a holiday in Canada the past two years, providing a domestic wine and culinary tourism market of 1.5 million adults (CTC, 2003c).

Demographic changes in Canada and US between 2000 and 2025 will result in substantial increases in the absolute number of people who will fit the profiles of the Heritage Tourism and Wine and

Culinary Enthusiast market segments. The Heritage Tourism segment will comprise the largest segment by 2025, with US and Canadian markets numbering 12.3 million adults and 3.0 million adults, respectively. The US Wine and Culinary Enthusiast market will grow substantively to 7.5 million adults, and the Canadian market to 2.0 million adults.

Vancouver Tourism Source Markets

The US Pacific² region, which is by far the most important tourism source market for the Vancouver region, is home to many Americans who show a tendency to engage in culture and heritage activities when they travel. Pacific residents comprise about one quarter of all Americans that can be categorized as either Urban Sophisticate or Geo-Savvy Geotourists. When the markets are refined around particular activity preferences, 17% of American Heritage Tourism Enthusiasts as well as 17% of Wine and Culinary Enthusiasts are found to reside in the Pacific region (Figure 2.1)

Figure 2.1: US Pacific Region Market Shares (Percent of Total Market)

	Geotourists ¹		Heritage Tourism Enthusiasts ²	Wine & Culinary Enthusiasts ³
	Geo Savvy	Urban Soph		
Market Size (adults, 2000)	16.3 million*	21.2 million*	8.3 million [†]	5.5 million [†]
% of Market residing in Pacific Region	26%	24%	17%	17%

* Represents size of total US market. [†] Represents size of Canadian market for specified enthusiast category

Sources: 1) TIA & NGT, 2002. 2) CTC, 2002b. 3) CTC, 2003f.

Vancouver's key domestic tourism source markets are, in rank order, B.C., Alberta and Ontario. B.C. residents comprise 14% of the Heritage Tourism market and 17% of the Wine and Culinary Enthusiast market. Alberta is home to 13% of Canada's Heritage Tourism Enthusiasts and 10% of Wine and Culinary Enthusiasts. Ontario is, however, where the majority of Canadian who can be characterized as Heritage Tourism (42%) or Wine and Culinary (41%) Enthusiasts reside.

Figure 2.2: B.C., Alberta & Ontario Market Shares (Percent of Total Market)

	Heritage Tourism Enthusiasts ¹	Wine & Culinary Enthusiasts ²
Market Size (adults, 2000)	2.2 million	1.7 million
% of Market residing in BC	14%	17%
% of Market residing in AB	13%	10%
% of Market residing in ON	42%	41%

Sources: 1) CTC, 2000. 2) CTC, 2003c.

² Comprised of Washington, California, Oregon, Hawaii and Alaska.

Market Overlaps

There are many arts and heritage interest overlaps among both American and Canadian Heritage Tourism Enthusiasts and Wine and Culinary Enthusiasts. Further, these market segments share many interests with Performing Arts and Visual Art attendees as well as with nature based interest markets, including:

- Soft Outdoor Adventure Enthusiasts – those travellers that participate in multiple soft outdoor activities, such as hiking/backpacking, wildlife viewing, fishing, and kayaking and canoeing, when on vacation.
- Hard Outdoor Adventure Enthusiasts - defined as travellers that have recently taken an overnight trip in order to experience adventure and excitement have participated in at least one high energy activity, such as mountain biking, rock climbing, scuba diving or whitewater rafting, while on trips.

The research findings show that more than one third (37%) of the US Heritage Tourism Enthusiast market segment are also Wine and Culinary Enthusiasts. Meantime, over half of this segment falls into the Visual Arts Enthusiast market (53%) and about third fit the Performing Arts Enthusiast profile (31%). Over one third are Soft Outdoor Adventure Enthusiasts (35%) and about one in five are Hard Outdoor Enthusiasts (19%). Shared interests also are found in the case of Canadian Heritage Tourism Enthusiasts. About two in ten of adults in this segment fit the Wine and Culinary Enthusiast profile while 41% seek visual art and soft outdoor adventure experiences and around one quarter are Performing Arts Enthusiasts (Figure 2.3).

Figure 2.3: Market Overlaps by Market Segment - 2000 (percent)

Market Segments	Heritage Tourism Enthusiasts ^{1, 2}	Wine & Culinary Enthusiasts ^{3,4}	Visual Arts Enthusiasts ^{5,6}	Performing Arts Enthusiasts ^{7,8}
US Market Size (adults, 2000)	8.3 million	5.5 million	7.0 million	3.8 million
Heritage Tourism Enthusiasts	100%	56%	62%	68%
Visual Arts Enthusiasts	53%	31%	100%	76%
Performing Arts Enthusiasts	31%	47%	41%	100%
Wine/Culinary Enthusiasts	37%	100%	37%	45%
Soft Outdoor Enthusiasts	35%	35%	33%	34%
Hard Outdoor Enthusiasts	19%	18%	20%	24%
Can Mkt Size (adults, 2000)	2.2 million	1.5 million	1.7 million	1.1 million
Heritage Tourism Enthusiasts	100%	33%	53%	46%
Visual Arts Enthusiasts	41%	27%	100%	64%
Performing Arts Enthusiasts	27%	20%	41%	100%
Wine/Culinary Enthusiasts	22%	100%	24%	27%
Soft Outdoor Enthusiasts	41%	40%	41%	36%
Hard Outdoor Enthusiasts	18%	20%	18%	27%

Sources: 1) CTC, 2002b. 2) CTC, 2002. 3) CTC, 2003 f. 4) CTC, 2003c. 5) CTC, 2003b. 6) CTC, 2003e. 7) CTC, 2003d. 8) 2003.

Significant overlaps also are found between US and Canadian adults who are identified primarily as Wine and Culinary Arts Enthusiasts. Both of these segments are highly likely to seek out soft outdoor adventure (40%) and heritage tourism (33%) experiences. Significant percentages also participate in visual arts, performing arts and soft and hard outdoor adventure experiences (Figure 2.3).

Propensity to Visit B.C.

B.C. is a popular destination for US travellers who participate in culture and heritage and wine and culinary experiences when they travel. With the exception of Ontario (58%), US Heritage Tourism Enthusiasts are most likely to have visited B.C. (33%) when they were visiting Canada (CTC, 2002b). US Wine and Culinary Enthusiasts also are most likely to have visited Ontario (61%), but about three in ten adults (29%) who fit this market profile and travelled to Canada in the past two years spent time in B.C. (CTC, 2003c). When it comes to the most popular destination for US Performing Arts Enthusiasts, B.C. slips to third place rank at 30%, behind Ontario (58%) and Quebec (41%) (CTC, 2003d).

When it comes to domestic Canadian travellers, 36% of Heritage Tourism Enthusiasts and 39% of Wine and Culinary Enthusiasts have visited B.C. in the last two years (CTC, 2002; CTC, 2003c).

Market Profiles

Sociodemographics

Comparative analysis of the recent studies of US and Canadian culture and heritage enthusiasts and wine and culinary enthusiasts reveals many socio-demographic commonalities as well as some minor differences. As summarized in Figures 2.4, these include:

- **Gender** – The gender split is relatively even among culture and heritage enthusiasts and wine and culinary experiences.
- **Age** – The various studies have found the average age of culture and heritage enthusiasts and wine and culinary enthusiasts to be mid to late 40s.
- **Education** – Arts, culture and heritage tourists are generally highly educated, with a high proportion being college/university graduates. Compared to heritage tourism enthusiasts, a higher percentage of wine and culinary enthusiasts hold university degrees.
- **Household income** – In the US, the research shows that all of the segments all have average household incomes of about \$70,000 USD or higher. The Canadian segments also have relatively high incomes, although the average levels are considerably lower at around \$60,000 CDN to \$65,000 CDN.
- **Household composition** – In both Canada and the US, the indications are that culture and heritage as well as wine and culinary tourists tend to live in adult only households.
- **Occupation** – The American studies that have collected information on occupations have all found that a high percentage of tourists that show a preference for culturally and socially-related travel are executives, managers or professionals.

Figure 2.3: Socio-demographic Characteristics of Heritage & Wine & Culinary Enthusiasts

Study & Focus	Gender	Age	Education	Household Income	Household Composition	Occupation
US Travellers						
TIA, 2002 Historic/Cultural Travellers	Equal men/ women	40% Baby Boomers	41% university degree	46% \$50,000+	Not available	31% managerial/ professional
TIA & NGT, 2002 Geotraveler – Urban Sophisticates	54% women	Avg 45 years 50% Baby Boomers	63% university degree 25% grad degree	\$76,630 avg 46% \$75K+ 17% \$100K+	70% adult only	23% executive/ managerial 43% professional/ specialty
TIA & NGT, 2002 Geotraveler – Geo Savvies	54% women	Avg 43 years 50% Baby Boomers	61% university degree 25% grad degree	\$68,220 avg 38% \$75K+ 17% \$100K+	59% adult only	21% executive/ managerial 43% professional/ specialty
CTC, 2002b Heritage Tourism Enthusiasts	51% men	Avg 48.9% yrs 58% 35-64 yrs	49% some post secondary 34% university degree	\$71,100 avg 57% \$60K+ 23% \$100K+	70% adult only	Not available
CTC, 2003c Wine & Culinary Enthusiasts	52% men	Avg 47.3 yrs 61% 35-64 yrs	47% some post secondary 37% university degree	\$76,600 avg 63% \$60K+ 29% \$100K+	78% adult only	Not available
Canadian Travellers						
Statistics Canada, 2001 Culture/Heritage Travellers	43% women 39% men 18% children	Not available	20% university degree	27% 80K+	Not available	Not available
CTC, 2002 Heritage Tourism Enthusiasts	50% men 50% women	45.1 yrs 63% 35-64 yrs	42% some post secondary 28% university degree	\$60,000 avg 44% \$60K+ 14% \$100K+	66% adult only	Not available
CTC, 2003c Wine & Culinary Enthusiasts	54% women	46.5 yrs 72% 34-64 yrs	44% some post secondary 27% university degree	\$65,500 avg 52% \$60K+ 19% \$100K+	76% adult only	Not available

Memberships & Media Habits

Memberships

About two thirds of American Heritage Tourism and Wine and Culinary Enthusiasts are members of auto clubs, such as AAA or CAA. Nearly one third of Americans who fit the profile of the Heritage Tourism Enthusiast belong to art gallery/museum organizations while 27% of Wine and Culinary Enthusiasts hold such memberships. Smaller percentages (under 20%) of both segments belong to nature or zoo/botanical garden organizations (Figure 2.4).

Canadian Heritage Tourism and Wine and Culinary are much less likely than their American counterparts to be members of clubs. About 45% of each segment belong to auto clubs but only small percentages belong to art gallery/museum, nature or zoo/botanical garden organizations (Figure 2.4).

Figure 2.4: Organization Membership of Heritage & Wine & Culinary Enthusiasts

Study & Focus	Auto Club	Art Gallery/ Museum	Nature	Zoo/ Botanical Garden
US Travellers				
CTC, 2002b - Heritage Tourism Enthusiast	63%	32%	16%	20%
CTC, 2003f – Wine & Culinary Enthusiast	60%	27%	17%	17%
Canadian Travellers				
CTC, 2002 - Heritage Tourism Enthusiast	45%	9%	14%	4%
CTC, 2003c – Wine & Culinary Enthusiast	44%	8%	10%	3%

Media Habits

Both American and Canadian Heritage Tourism and Wine and Culinary Enthusiasts read newspapers and magazines regularly. The vast majority read the weekend and weekday editions of local newspapers, including the travel sections. Community newspapers are also very popular. Sixty percent (60%) or better of these tourists watch the early evening news and over half watch the late evening news. Travel magazines are read regularly by many American and Canadian Heritage Tourism and Wine and Culinary Enthusiasts (Figure 2.5).

Figure 2.5: Media Habits of Heritage & Wine & Culinary Enthusiasts

Study & Focus	Weekend Newspaper Edition	Weekday Newspaper Edition	Travel Section Weekend	Travel Section Weekday	Community Newspapers	Travel Magazines	Early Evening News	Late evening news
US Travellers								
CTC, 2002b – Heritage Tourism Enthusiasts	88%	84%	76%	63%	80%	52%	64%	48%
CTC, 2003f – Wine & Culinary Enthusiast	87%	81%	77%	64%	83%	59%	59%	51%
Canadian Travellers								
CTC, 2002 – Heritage Tourism Enthusiasts	75%	72%	63%	59%	83%	42%	63%	54%
CTC, 2003c – Wine & Culinary Enthusiasts	78%	79%	57%	49%	73%	46%	63%	59%

1.5.1 Activities

Figure 2.6 summarizes the findings of the various recent studies with regard to the most popular activities of Heritage Tourism and Wine and Culinary Enthusiasts. The activities identified are those

which many of these tourists participated in on a recent trip. The findings provide greater insight into the shared interests of arts, culture and heritage travellers. They illustrate that visiting/attending historic sites, museums, festival and fairs, live theatre and art galleries are popular activities for Canadian and American Heritage Tourism and Wine and Culinary Enthusiasts as well as for Performing and Visual Arts Enthusiasts. One of the most notable findings is that these travellers also enjoy a range of non-arts, culture and heritage activities. Their high participation levels in soft outdoor adventure and mainstream tourism activities clearly show that these travellers desire vacations which allow them to indulge their interest in arts and culture but also to partake in other types of experiences.

Figure 2.6: Activity Preferences of Heritage, Wine & Culinary and Arts Enthusiasts

Study	Market Segment					
	Heritage	Wine & Culinary	Performing Arts	Visual Arts	Outdoor	Mainstream
US Travellers						
TIA, 2002 – Historic/ Cultural Traveller	43% Historic Site 30% Museum 20% Heritage/ ethnic festival	Not available	23% Live theatre 10% Opera/classical concert 9% Dance performance 19% Other concert	21% Art Gallery	Not available	Not available
CTC, 2002b – Heritage Tourism Enthusiast	81% General history museums 68% Farmers' fairs or markets 67% Local festivals or fairs 64% Science & tech museums 63% Historic sites 55% Historical replica cities/towns	Not available	57% Live theatre	79% Arts/crafts studios 66% Art Galleries	58% Wildlife viewing 53% Flora viewing 38% Hiking/backpacking 37% Cycling 35% Fishing	66% Zoos 59% Aquariums 57% Botanical gardens 44% Casinos 31% Planetariums
CTC, 2003f – Wine & Culinary Enthusiast	61% General history museums 53% Local festivals or fairs 51% Farmers' fairs or markets 48% Science & tech museums 47% Historic sites 39% Historical replica cities/towns	85% Day visits to wineries 74% Tour wine region 70% Dine at fine restaurants 12% Stay at accommodations with gourmet restaurant	64% Live theatre 34% Classical concerts	99% Arts/crafts studios 99% Art Galleries	52% Wildlife viewing 46% Flora viewing 35% Golfing 32% Fishing 31% Hiking/backpacking 30% Cycling	59% Zoos 56% Aquariums 56% Botanical gardens 40% Casinos 30% Planetariums

Study	Market Segment					
	Heritage	Wine & Culinary	Performing Arts	Visual Arts	Outdoor	Mainstream
Canadian Travellers						
Statistics Can - 2001 Cultural/Heritage Travellers	32% Historic Site 29% Museum or art gallery 28% Festival/fair	Not available	21% Play or concert	29% Art gallery or museum	56% Outdoor activity 40% Hiking/climbing 24% National/provincial park 19% Birdwatching	16% Zoo or natural site
CTC, 2002 – Heritage Tourism Enthusiast	86% General history museums 67% Farmers' fairs or markets 65% Local festivals or fairs 58% Science & tech museums 55% Historic sites 54% Historical replica cities/towns 39% Pick your own farms/harvesting	Not available	48% Live theatre	72% Arts/crafts studios 56% Art Galleries	61% Wildlife viewing 50% Flora viewing 48% Hiking/backpacking 34% Cycling 35% Fishing 33% Golfing 31% Bird watching 30% Whale watching	57% Zoos 46% Botanical gardens 45% Aquariums 32% Planetariums
CTC, 2003c – Wine & Culinary Enthusiast	52% General history museums 44% Farmers' fairs or markets 39% Local festivals or fairs 36% Science & tech museums 32% Historic sites 26% Historical replica cities/towns	73% Day visits to wineries 60% Tour wine region 58% Dine at fine restaurants 29% Stay at accommodations with gourmet restaurant	51% Live theatre 24% Classical concerts 22% Theatre festivals 21% Music festivals	69% Arts/crafts studios 48% Art Galleries	42% Wildlife viewing 40% Hiking/backpacking 40% Flora viewing 38% Golfing 32% Cycling 30% Whale watching	45% Zoos 41% Botanical gardens 34% Aquariums

Learning and Enrichment Travel Market

As defined by the Learning and Experiential Alliance Canada (LETA), the Learning and Experiential niche segment refers to vacations with authentic, hands-on or interactive learning experiences. These are the travel experiences that broaden the mind and enrich the soul. Learning vacation themes relevant to the new Langley Heritage Centre include culture, heritage and education as well as associated themes such as agriculture, cuisine, wine and nature.

Learning holidays are an emerging travel trend. A recent Canadian Tourism Commission study found that 7.2% (12.1 million) of travellers in North America sought out a participatory hands-on learning experience while on vacation during the previous two years. In addition, 8.0% of travellers (13.8 million) expressed an interest in participating in this type of vacation experience over the next

two years. While there was little difference in the participation rate of Canadians and Americans in vacation learning experiences, Americans were 53 % more likely to express an interest in pursuing a hands-on learning experience while on vacation over the next two years.

In both the Canadian and US markets, Young Singles and Mature Singles were the most likely to have sought out hands-on learning experiences while on vacation. American Mature Families (i.e., those with teenage children) were more likely to have sought out a hands-on learning experience while on vacation during the past two years.

Compared to the average traveller, travellers who sought out a hands-on learning experience while on vacation during the past two years were much more likely to seek out activities relevant to the new Langley Heritage Centre, including visiting museums, historic sites, Aboriginal cultural activities, local agricultural fairs and natural sites. They displayed above average tendencies to be patrons of the high arts (e.g., ballet, opera) and to have visited zoos and aquariums.

These travellers were quite active in a broad range of outdoor activities, especially energetic activities such as team sports, canoeing, kayaking and backpacking. However, they were also more likely than the average traveller to participate in viewing natural phenomena (e.g., whale watching) and natural sightseeing (e.g., viewing wildlife and wild flora), indicating their keen interest in nature (CTC, 2001).

Agritourism

The B.C. Agritourism Alliance defines agritourism as travel that combines agricultural or rural settings and products within a tourism experience. It includes providing visitors with a broad spectrum of agriculturally-based experiences ranging from fruit and vegetable stand shopping (direct farm marketing) to winery, orchard, garden and alpaca tours, from farm-based bed and breakfast accommodation, to participation in harvest festivals, farmer's markets and cattle drives. BCATA was formed in 2003 in recognition of the growing market demand for agritourism and with the objective of providing strategic guidance the industry (BCATA, 2003). Its creation is a positive step for the agritourism industry and should enhance Langley's positioning as an agritourism destination.

According to a 2001 report on agritourism, 7.3% of both US (12.3 million adults) and Canadian travellers (1.5 million adults) have expressed a high interest in agritourism activities. About 33% in both countries had participated in at least one of three specified agricultural-related activities (i.e., farmer's markets; visited a pick-your-own farm; participated in a harvest; stayed at a working farm or guest ranch) while on a trip during the past two years. This represents an agritourism market of about 115 million adults in the US and 13 million adults in Canada. The most promising demographic segments are Affluent Mature and Senior Couples (43%), Affluent Families (39%), Mainstream Mature Couples (37%), and Affluent Singles (36%).

With the presence of several wineries, an agritourism niche market with good potential for the Langley area is wine and cuisine tourism. These tourists taste and purchase wine at wineries as well as realizing a meaningful cultural experience via the linking of the wine estate with local cuisine, culture, lifestyle and territory. The highest potential market segments for wine and cuisine tourism among North Americans are Affluent Mature and Senior Couples (59%), Affluent Mature Singles (41%) and Affluent Young Couples (40%) (CTC, 2001b).

Aboriginal Tourism Market

Several recent studies have identified a large market of visitors with a specific interest in First Nations culture. Aboriginal tourism is tourism that is aimed at appreciating and understanding Aboriginal culture and natural history. Aboriginal tourism experiences involve the history, customs, social structure and art of an Aboriginal culture. Examples of Aboriginal tourism experiences include song and dance performances, participatory arts and crafts programs, and nature tours such as herbal walks.

With regard to the North American market, CTC analysis of TAMS data found that more American than Canadian travellers (16.5% vs. 9.2%) expressed an interest in Aboriginal tourism. Well-educated Mature and Senior travellers have the best potential. There is a strong correlation between travellers who participated in Aboriginal tourism and other arts and heritage tourism activities such as visiting historic sites, museums and agricultural and local fairs (CTC, 2001).

An Aboriginal Cultural Tourism Travel Market Study was conducted in 2003 as part of a wider initiative by the Aboriginal Tourism Association of British Columbia (AtBC) aimed at developing an Aboriginal tourism “Blueprint” strategy for the province. A series of pre- and post-visit surveys were conducted with travellers at various locations around the province in order to identify the main characteristics of those travellers who were actually taking part in Aboriginal cultural travel in B.C. The findings concluded that Aboriginal cultural tourism visitors were particularly interested in visiting destinations that gave them the opportunity to:

- Increase their knowledge
- Experience unique places and see new and different cultures
- Feel personally safe

These visitors tended to be:

- Well-educated, upper middle-income wage earners, female, baby boomers
- Visiting primarily from the US (29%), B.C. (23%), and other parts of Canada (22%)
- Including Aboriginal cultural tourism in their B.C. travels for the first time (65%)
- Taking part in Aboriginal cultural tourism in places beyond B.C. (64%)
- Either touring (43%), or visiting friends and relatives (21%)

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APPENDIX 2

Agritourism Touring Programs

<i>Partnership & Theme:</i>	The Fruit Loop – Oregon Orchards and vineyards
<i>Contact Info:</i>	Phone: 541-386-7697 Email: jamqueen@aol.com Web: www.hoodriverfruitloop.com
<i>Description:</i>	The Fruit Loop is a self-driving tour that winds through 35 scenic miles of orchards, farms, forests and friendly communities in the Hood River Valley, the nation's largest pear growing region. An hour away from Portland. Attractions include fruit stands, destination farms, an alpaca ranch, a chestnut orchard, berry farms, wineries, farm bakeries and more.
<i>Packaging & Marketing:</i>	Guide book and map that provides information on each farm and how to reach; availability dates for produce; accommodation, shopping and dining info; recipes; events listing of fruit and harvest celebrations. Reproduced on web site, including clickable map and links to members' on-line gift shops. Tour arm, Ag Experiences, specializes in rural agricultural and culinary experiences for groups of 20 or more. Offer intimate experiences of growing, producing, and dining with fruit and wine. Behind-the-scenes farm experiences, workshops, cooking demonstrations/lunches, winery tours, heirloom apple tastings, old fashioned farm picnics or pancake breakfasts.
<i>Other:</i>	Began in 1993, membership has grown from 16 to 24. \$400 membership fee (brochure/map and website), \$50 per event listing. Created a cookbook to sell as fundraiser and sold 2500 copies. Income tracking has shown that members have shown average a 20 – 30% increase in gross income on a monthly basis (tracking started in 2000).
<i>Sources</i>	http://www.hoodriverfruitloop.com/ http://www.hoodriver.org http://www1.agric.gov.ab.ca/\$department/deptdocs.nsf/all/apa547

<i>Partnership & Theme:</i>	Okanagan Cultural Corridor – BC Arts and culture, vineyards, orchards, etc.
<i>Contact Info:</i>	Phone:800-663-4345 Email: info@culturalcorridor.com Web: www.culturalcorridor.com
<i>Description:</i>	The Okanagan Cultural Corridor focuses are cultural tourism and agritourism, building on the strengths of the wine industry and the largely unrealized potential of the region's cultural resources. Encompasses the area covered by the 3 regional districts of North Okanagan, Central Okanagan and Okanagan-Similkameen. Members include art studios and galleries, museums, heritage sites, agritourism attractions and wineries, performances and events.
<i>Packaging & Marketing:</i>	Full color guide book with individual attractions' profiles, maps, and directories for attractions in each region; accommodation, shopping and dining info; calendar of events. Very attractive web site includes guide book info, and PDF version of guide. Newsletter available online and emailed to over 500 recipients. Plan to create 10 different "Experience Routes" or sub-corridors. These routes include clusters of nature-based features, cultural and heritage attractions, agritourism and wineries, dining, retail and accommodation. Also planning "cultural passport" program, advertising in key markets, and media and PR work.
<i>Other:</i>	A pilot product in cultural tourism that began in 2000 and has received significant funding. Seriously began marketing in 2003. Over 100 members. Membership fee provide advertising in brochure/map and website
<i>Sources:</i>	www.okanaganculturalcorridor.com

<i>Partnership & Theme:</i>	Taste the County - Ontario Agritourism, arts, culture and nature tourism
<i>Contact Info:</i>	Phone: 613-393-2796 Email: info@tastethecounty.ca Web: www.tastethecounty.ca
<i>Description:</i>	Taste the County is a marketing and quality enhancement project designed to stimulate the economy of Prince Edward County. Its founding partners are The Prince Edward County Chamber of Tourism and Commerce (PECCTAC) and the Prince Edward County Federation of Agriculture. Located in Southeastern Ontario, The County has a unique island character and 800 km of spectacular coastline. The theme of the marketing campaign is based on all the wonderful "tastes" of Prince Edward County's wonderful agricultural products and fisheries products, as well as the history, the natural beauty, the recreational activity, the culture and artistic talent.
<i>Packaging & Marketing:</i>	Taste the Country brochure and consumer web site are central marketing initiatives. Feature range of tourism destination info from profiles of members, to calendar of events, accommodation, shopping, dining, activities and community services. Three types of business memberships from Commercial (\$130) to Major Partner (\$205) to Corporate Partner (\$1,250), with varying levels of marketing benefits. Other initiatives include B2B web site for members, members' newsletter and workshops and seminars. Developing The TASTE Trail program to create a tour route through the County to enjoy delicious foods and beverages produced by locals, from local ingredients, at local establishments. Businesses will be linked via the TASTE Trail theme and guide book with road signs that encourage and invite people into their establishments to enjoy their "tastes". The TASTE Trail will feature businesses that showcase local gourmet offerings for consumers to appreciate in order to showcase regional foods and cuisine and create greater awareness and appreciation of the richness of foods on offer.
<i>Source:</i>	www.tastethecounty.ca

<i>Partnership & Theme:</i>	Sonoma County Farm Trails - California Farms, wineries, breweries and cheese factories
<i>Contact Info:</i>	Phone: 707-571-8288 or 800-207-9464 Email: farmtrails@farmtrails.org Web: www.farmtrails.org
<i>Description:</i>	Sonoma County Farm Trails supports sustainable agricultural diversity in Sonoma County through the promotion of its members' products via on site sales, organized retail opportunities, marketing and public relations campaigns, and educational forums. Visit our Farms program features visits to members offering a variety of fresh in-season produce, outstanding products and an on-the-farm experience.
<i>Packaging & Marketing:</i>	Map & Guide (over 100,000 distributed each year) with individual attractions' profiles, maps, and directories for attractions in each region; accommodation, shopping and dining info; calendar of events. Reproduced on web site. Three types of business memberships from Commercial (\$130) to Major Partner (\$205) to Corporate Partner (\$1,250), with varying levels of marketing benefits. Roadside signs, newsletter, media relations and representation at fairs, festivals and trade shows. Annual weekend Apple Fair, other fairs and events. Workshops and seminars for members.
<i>Source:</i>	www.farmtrails.org

<i>Partnership & Theme:</i>	The Cowboy Country – Alberta Farms and ranches
<i>Contact Info:</i>	Phone: 866-627-3051 E-mail: cowboytrail@telus.net Web: www.thecowboytrail.com
<i>Description:</i>	The Cowboy Country follows the historic Cowboy Trail, a 700 km route along highway 22. Focus is western vacations and adventures, including staying at a guest ranch or working ranch, farm and ranch vacations, horseback trail rides or pack trip, rodeos, festivals, pow-wow and western and wilderness accommodation. Members include activities and events, tour operators, rural towns and farmers and ranches.
<i>Packaging & Marketing:</i>	The Cowboy Trail brochure includes info on accommodation, attractions, events and shopping. Produce and distribute 30,000 copies to travellers and promote at Calgary Stampede and via media. Web site includes brochure info, <i>Stories from the Saddle</i> . Online store is in the works. Plan to expand range of corporate partners, develop three packages and a web site targeted to travel trade, and a program to monitor and assess marketing effectiveness.
<i>Other:</i>	Received funding from Calgary and Area Tourism Region Association.
<i>Sources:</i>	www.thecowboytrail.com www.agric.gov.ab.ca/economic/mgmt/diversification/index_news.html

<i>Partnership & Theme:</i>	Ryder Lake Ramble – Chilliwack Farm and garden tour
<i>Contact Info:</i>	Phone: 604-858-8121/7089 (Chilliwack Visitor Information Centre) Email: not available Web: http://mypage.uniserve.ca/~bcwild/index.html
<i>Description:</i>	The Ryder Lake Ramble began in 1998. A one day self-guided tour of 15 sites including farms with unusual animals, exceptional and unique gardens, peaceful woodland trails, panoramic vistas, and much more. One of their main goals is to give people the opportunity to re-connect with the country.
<i>Packaging & Marketing:</i>	Brochure including map and descriptions of participating sites. Basic web site, including driving instructions and descriptions of sites. Map to be added. Admission \$5.00 per person or \$10.00 per car.
<i>Other:</i>	Attendance has grown from 300 in 1998 to 1,100 in 2002. In 2003, extended promotion area to Vancouver using signage.
<i>Sources:</i>	http://mypage.uniserve.ca/~bcwild/contact.html http://www.chilliwacktimes.com/issues03/063203/features.html http://www1.agric.gov.ab.ca/\$department/deptdocs.nsf/all/apa547

<i>Partnership & Theme:</i>	Country Soul Stroll – Alberta Farms, gardens and arts
<i>Contact Info:</i>	Phone: 780-939-4320, ext. 222 Email: slevesque@sturgeoncounty.ab.ca Web: www.countrysoulstroll.ca
<i>Description:</i>	Country Soul Stroll is a self-guided driving route through the countryside of Sturgeon County and its neighbouring communities. It is an annual event taking place in July. More than 16 ag inspired sites are showcased, giving visitors an opportunity to participate in a variety of hands-on activities.
<i>Packaging & Marketing:</i>	Guide/Map showing route, descriptions of participating sites. Highway signage, media picnic, promotion at farmer's markets. Corporate sponsorships, from Country Stroller Sponsor (\$500) to Adopt A Barn (\$1000) to Major Sponsor (\$1500), with varying levels of marketing benefits. Attractive web site, reproduces guide/map and provides info on accommodation. Group tours for youth and adults. Most four to four and one half hours, and including lunch.
<i>Other:</i>	Admission \$7 per person, \$25 per carload.
<i>Source:</i>	www.countrysoulstroll.ca/

<i>Partnership & Theme:</i>	Farm Fresh Agritourism – Vancouver Island Range of agritourism, arts, culture and heritage
<i>Contact Info:</i>	Phone: (250) 544-0941 Email: info@islandfarmfresh.com Web: http://www.islandfarmfresh.com/agritourism.html
<i>Description:</i>	Promotes South Vancouver Island businesses which participate in agritourism including, farm tours and festivals, farmers' markets, wineries, and on-farm accommodation
<i>Packaging & Marketing:</i>	Annual "Farm Fresh" consumers guide promotes agritourism. Web site promotes members using thematic approach. Organize annual "Tour of Farms", and a special Farmers' Market at the historic Saanich Fair on the Labour Day weekend.
<i>Other:</i>	Initiative of the Southern Vancouver Island Direct Farm Marketing Association.

<i>Partnership & Theme:</i>	Travel Country Roads Canada – Manitoba Full range of agritourism
<i>Contact Info:</i>	Phone: 204-476-5062 or -866-476-5062 E-mail: countryroads@mts.net Web: www.countryroadsagritourism.com
<i>Description:</i>	Travel Country Roads Canada is an organization dedicated to developing and promoting rural Canada as a world-class tourist destination. Evolved from Country Roads Agri-Tourism Product Club, a Canadian Tourism Commission product development initiative, mission of which was to create and enhance market readiness of agritourism product.
<i>Packaging & Marketing:</i>	As Product Club from 2000 to 2003, focused product development, training and communication activities. Currently has only a B-2-B web site. Moving into marketing quality rural tourism products to travellers. Activities will involve developing an industry needs assessment, consumer website and tour packages.
<i>Other:</i>	Received funding from Manitoba Agriculture and Food, Manitoba Country Vacations Association, Manitoba Culture Heritage and Tourism, Manitoba Tourism Education Council and the Canadian Tourism Commission.
<i>Sources:</i>	www.countryroadsagritourism.com

APPENDIX 3

List of Organizations Interviewed

Organization	Contact	Telephone/email
GOVERNMENT		
Ministry of Agriculture	Harvey Sasaki - Assistant Deputy Minister Brent Warner - Industry Agritourism Specialist	250-356-1122 harvey.sasaki@gov.bc.ca 250-356-1704 brent.warner@gov.bc.ca
Ministry of Agriculture (on secondment to Tourism BC)	Donna Anaka - Promotions	604-775-0931 donna.anaka@gov.bc.ca
Tourism BC	Don Foxgord - Vice-President, Business Development	604-660-3759 dfoxgord@tourism.bc.ca
TRAVEL TRADE & TOURISM INDUSTRY		
BC Agritourism Alliance	Robert Thompson – Coordinator	250.544.0941 coordinator@agritourismbc.org
Blue Ice Communications	Cathy Holler – President	604.693.0030 cathy@blueice.ca
CanEscapes (BCAA)	David Shawcross	604.268.5000 dshawcross@canescapes.com
Cantrav West Services Ltd.	Carol Leard, Director - Team Support & Supplier Relations	604.879.0950 cleard@cantrav.com
Globus & Cosmos Tours	Susi Roller – Tour Conductor	250.654.3036 sroller@globusandcosmos.com
Grayline Tours	Doug McCandless – Sales Manager	604.871.3661 doug.mccandless@grayline.ca
JAC	Todd Williams – Group Manager	604. 687.5999 Sales@jactravel.bc.ca
LandSea Tours	Scott Mason - Manager	604.255.7272 scott@vancouverstours.com
Maple Fun Tours	Bill Bessho – General Manager	604.683.5244 bbessho@maplefun.com
Routes to Learning	Jo-Anne Lachapelle-Beyak - Director Program Development	613.530.2222 j.beyak@routestolearning.ca
Tourism Vancouver	Stephen Regan - Manager, Destination Development	604.631.2884 sregan@tourismvancouver.com
Vancouver Coast & Mountains	Kevin Ridgeway - CEO	604-638-6930 kevan@vcmbc.com