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Tourism, Festivals and Live Performances: Facts, Trends and Opportunities

**Brief written in the context of the development of the federal
government's tourism strategy**

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The Honourable Mélanie Joly
Minister of Tourism, Official Languages and La Francophonie

and to

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Adizokan, a creation by Red Sky Performance and the Toronto Youth Symphony Orchestra at Fall for Dance North in 2018.
Photo: David Hou.

Tourism, Festivals and Live Performances: Facts, Trends and Opportunities

If nature and outdoor experiences – natural attractions such as waterfalls or mountains, nature parks, hiking or nature walks, wildlife and aquatic life observation – have always been the most popular activities for tourists visiting Canada, cultural experiences undoubtedly also have a strong tourist appeal.

More particularly, with the rise of the experience economy,

live performances are poised to become sought-after activities by tourists, whether as a central travel

activity or as a complementary activity, in leisure tourism and business tourism, year-round.



Nature and culture blend together at the Festival de la chanson de Tadoussac, as is seen at this outdoor performance by Keith Kouna. Photo: Marc Loiselle.

Festivals and live performance series: unique and complementary tourist offers

It is well known that festivals and major events can play a determining role in the choice of destination and/or the departure time of the tourist. For fans of major events, festivals are trip anchor activities (i.e., activities important enough for travellers to dedicate their trip to them). For others, festivals only become a factor once a destination is actually being considered for travel. Festivals can then influence the creation of a trip scenario, and then the planning of the itinerary and the exact time of the trip.

Individual live performances, that is performances presented in a venue outside the context of a festival, do not have the prestige of major events, but they are nonetheless activities sought by tourists once they have arrived at their destination. And they generate considerable expenditures (see below).

If festivals have a slightly greater attraction potential than live performances and sporting events before the time of departure (14% and 13% of Canadians respectively, say that they account for central travel activities), these two types of cultural events generate important participation rates once tourists have arrived at their destination. This is the case for Canadian tourists: 10% attend music festivals during their

travels and 15% attend live performances and sporting events.¹ The same is true for international tourists with a participation rate of 10.7% for festivals and 11.4% for other cultural events.²

The Canadians questioned as part of focus groups on arts participation confirm what the major tourism surveys report:

several participants in most groups noted that they will travel out of province and even out of country for “special” events, most notably as large concerts or music festivals. Also, it is common to plan to attend events when travelling even though that was not the main reason for the travel.³



Major festivals attract crowds and showcase their host city. This is the case with the Ottawa RBC Bluesfest during this show by Marty Baller with A\$AP Ferg. Photo: Steve Gerecke.

¹ Destination Canada, [Global Tourism Watch: 2017 US Public Summary Report](#).

² Canadian Tourism Commission, [Tourism Snapshot, 2012 Year-in-Review](#).

³ Corporate Research Associates, [Focus Groups on Canadians' Participation in the Arts, 2018](#).

Three trends; three opportunities for the tourism and live performance sectors

In order to best measure the growing tourism potential of the live performance sector, in venues or during festivals, three major trends deserve to be taken into consideration.

Focus on the intangible



Each year, in January, Vancouver's International PuSh Festival proposes unique and memorable artistic experiences to Canadian and foreign tourists. Photo: Kris Krug.

First, experts agree that cultural tourism will continue to gain importance in the context of the experience economy.⁴ In particular, this will manifest itself by a shift in the choices of tourists in favour of intangible and contemporary cultural experiences.⁵ It goes without saying that contemporary creation in the performing arts is directly in line with this trend. To fully benefit from this trend, live performance presenters will have to risk programming audacious works and experiences. And governments will have to support them financially to that effect.

The *bleisure* phenomenon

The *bleisure* phenomenon, a practice that consists of extending a business trip by one or two nights for leisure, is in full swing, especially with the millennial generation. Since the destination and timing of business trips are predetermined, the *bleisure* tourist escapes the typical path-to-purchase cycle. In particular, the planning stage of the *bleisure* tourist is much more targeted and condensed. Most *bleisure* tourists dedicate one to five hours of research before deciding to add a leisure component to a business trip and are motivated by quality entertainment. Plays and concerts are part of the activities they seek; however, only 21% of them purchased tickets before going on a trip.⁶ *Bleisure* tourism thus represents an interesting potential for live performance presenters as long as 1) we successfully portray Canadian destinations as exciting entertainment destinations and 2) we manage to provide the business tourists with information on nearby live performances at the right time and place – and through their preferred

⁴ World Tourism Organization (UNWTO), [Tourism and Culture Synergies](#), 2018.

⁵ OCDE, [Tourism and the Creative Economy](#), 2014

⁶ Expedia Group Media Solutions, [Unpacking Bleisure Traveler Trends](#), 2018.

digital tools. As a matter of fact, technology is perceived as a tool for simplifying the whole of business travellers' journey and experience.⁷

All-season tourism

The notion of peak season is about to be redefined by new off-peak tourism trends, like business tourism and winter tourism. As a matter of fact, vacations which used to be concentrated in the summer season, are organized more and more out-of-season and particularly in winter. According to a survey conducted by Harris Polling, four out of five Americans plan to go abroad in the winter and half of them would be interested in a cold climate destination.⁸



The Hockey Sweater: A Musical, Segal Centre, 2017.
Photo: Leslie Schachter.

A recent report by McKinsey and Destination Canada echoed this trend.⁹

Moreover, it highlighted that Canada's value proposition for a prosperous tourism industry will depend on:

1. A balanced four-season offer
2. Unique Canadian experiences and
3. Visitors who spend a lot of money

Major winter festivals and live performance series presented in the fall, winter and spring meet each one of these imperatives.

Travellers who spend money

Cultural tourists tend not to skimp on expenses. Furthermore, live shows occupy a major place in their budget.

According to a study done in Ontario, the artistic and cultural tourist spends on average twice as much per trip than a typical tourist - \$667 per trip compared to \$374¹⁰.

⁷ Julie Payeur, "Regard sur les tendances du tourisme d'affaires", retrieved on the [Tourism Intelligence Network](#), on May 1st, 2019. In French only

⁸ Qantas and Harris Polling, Consumer Trends Travel Survey, quoted in Forbes, "[Winter Travel Experiences Around The Globe: Safaris, Carnivals, Northern Lights And More](#)", 2 février 2017

⁹ McKinsey & Company, [Unlocking the potential of Canada's visitor economy](#), 2018.

According to data from Statistics Canada, tourists spend more on live performances than on any other product or activity related to culture or sports. In 2016, Canadians spent \$323 million for performing art performances and \$56 million for festivals and celebrations during their travels in the country. And foreign tourists are even more fond of these. In 2016, foreign tourists visiting Canada spent \$188 million for performing arts events and \$32 million for festivals. These live performance expenses accounted for 41% of the foreign tourists' total cultural expenses, which represented 2.7% of all export expenses¹¹.



Thus, in terms of tourist offer appeal, the tourist's journey, business tourism and the expenses resulting from the tourist activity, festivals and individual live performances play both crucial and complementary roles.

**Le Festival en chanson de Petite-Vallée.
Photo: Nathalie Dion.**

Cultural Policy Considerations

The [2019 Federal Budget](#) announced the creation of a fund for Canadian experiences which will most likely be the central measure of the federal government's new tourism policy. Funded with \$58.5 million over two years, this fund will be centred around five priorities: tourism in rural and remote communities, Indigenous tourism, winter tourism, inclusion (particularly for the LGBTQ2 community) and culinary tourism.

While it is unfortunate that culture was not specifically named in this policy statement, it should be noted that it has not been excluded. The fund for tourist experiences aims to "create new tourism products or experiences" which would benefit from including events in the entertainment sector.

¹⁰ Research Resolutions & Consulting, [Ontario Arts and Culture Tourism Profile](#), 2012.

¹¹ Statistics Canada, [Tourism spending on culture and sport products, 2016](#). Note: Many festivals and live performances attended by tourists are free events. While these don't generate direct expenses, they induce many other tourism expenses. .

Furthermore, the federal budget planned for significant support for artists and cultural events:

- 16 million dollars over two years to the Canada Arts Presentation Fund, which supports not-for-profit performing arts organizations – including festivals and performing arts series – in all regions of the country
- 24 million dollars over two years to the Building Communities Through Arts and Heritage Program and the Celebration and Commemoration Program, in order to support more festivals, large-scale community-based celebrations and initiatives

This funding will clearly support the federal tourism strategy, which relies on a whole-of-government approach involving the Department of Canadian Heritage. **This relationship between tourism and culture should be specifically articulated in the federal tourism strategy**, as it would not only depend on the participation of the Department of Canadian Heritage, but also that of the entertainment sector. Thus, we must indicate to all parties where they figure in the strategy and which role they are called upon to play.

However, the 2019 Budget investments for cultural events are aimed at recurring programming, namely live performance series that are tightly coordinated and planned many months, even years, in advance. This kind of programming requires predictable funding, contrary to the 2019 Budget investments which only have a two-year duration and which, for now, aren't supported with plans to ensure the long-term development of the performance sector. The federal government should see to filling this gap as soon as possible. **First, the federal government should clearly signal its intentions regarding program funding for cultural events in the federal tourism strategy, and, second, see to making these funds permanent as of the 2020 budget and to increasing them over time.**

Furthermore, in relation to its whole-of-government approach in terms of tourism, the Government of Canada could also see to support both the tourism and entertainment sectors with investments focused on the live performance discoverability, at the appropriate time and location by tourists and local consumers alike (see below). At first glance, this can first be achieved through existing programs, but fully upgrading the live performance sector with regard the new requisites of the web of data could eventually require dedicated investments.

Opportunities for the Entertainment Sector

Performing arts presenters and festival organizers would be well advised to stay tuned to opportunities to join a regional tourism offer included in one of the five pillars of the federal strategy:

1. Tourism in rural and remote regions
2. Indigenous tourism
3. Winter tourism
4. Inclusion (particularly for the LGBTQ2 community)
5. Culinary tourism

Generally speaking, the relationship between the live performance sector and the tourism sector is already very strong. According to a survey by Hill Strategies Research,¹² more than half of Canada's live performance presenting organizations collaborate with the tourism sector in one way or another. Tourism even ranks fourth in the sectors with which live performance presenters collaborate the most, right behind elementary and high school education. This, of course, requires resources and this type of collaboration is thus more frequent with large-scale presenters and with those receiving support from the federal government. That being said, presenting organizations who do not have the resources to engage in sustained collaborations with the tourism sector can still get in contact with their local and regional tourism associations and inquire about the services they can provide.



Songs and percussion performance by Qaggiavuut Nunavut Performing Arts. Photo: Chris Coleman.

¹² Hill Strategies Research, [Vitality and Impact of Art Presenting](#), 2019.

Finally, with regards to digital innovation, the live performance sector has a lot of catching-up to do. The level of knowledge and the use of metadata are weak.¹³ And without quality metadata to inform algorithmic decisions,¹⁴ search and recommendation technologies driven by artificial intelligence are incapable of delivering recommendations that can answer the question “are there any live performances to see tonight close to where I am?” for consumers – and tourists.

Thus, performing arts organizations must quickly gain a capacity to produce quality metadata, usable by search and recommendation algorithms and interoperable both with performing arts knowledge bases (or other kinds of information systems) and tourism knowledge bases. In particular, this metadata will have to be associated with accurate geographic metadata, interoperable with the geographic information systems,¹⁵ so that tourists can easily find live performances wherever and whenever they travel.



What's better than a surprise live performance to create a memorable moment. With geographic metadata, it becomes possible to propose this kind of event to spectators from their cartography application. Photo: Jean-Charles Labarre.

Some recent digital initiatives such as *A Linked Digital Future* will very soon contribute to this upgrade. We hope that other similar initiatives will follow suit and that governments will give them all the support they need.

About CAPACOA

The Canadian Arts Presenting Association/l'Association canadienne des organismes artistiques (CAPACOA) serves the performing arts touring and presenting community through its commitment to integrate the performing arts into the lives of all Canadians.

Founded in 1985, the association plays a leading role in the research and development of cultural policies promoting a healthy, equitable and dynamic performing arts ecosystem.

¹³ Institut de la Statistique du Québec, *État des lieux des métadonnées relatives au contenu culturel*, 2017.

¹⁴ Fenwick McKelvey and Robert Hunt, *Algorithmic Accountability and Digital Content Discovery*, 2019.

¹⁵ Frédéric Julien, *Métadonnées géographiques et offres culturelles*, 2019.