

The Cultural & Heritage Traveler Study

By Rosemary McCormick, President, Shop America Alliance



A White Paper From



\$14.95

Shop America Alliance and the U.S. Cultural & Heritage Tourism Marketing Council have formed a strategic partnership with the Museum Store Association. This is the seventh in a series of white papers to address shopping tourism for the cultural commerce professional.

For more information, please contact the Museum Store Association and visit *www.museum-store.travel*, *www.TheCulturalTraveler.com*, *www.USCHT.com* and *www.ShopAmericaTours.com*.

Table of Contents

Introduction	3
MSA's Tourism White Paper Series	3
Key Tourism Concepts Review	3
What Is Cultural and Heritage Travel?	4
New Research Underscores Popularity of U.S. Cultural and Heritage Travel	4
15 Most Significant Findings	6
Top 10 Cultural and Heritage Activities	8
Five Defining Cultural and Heritage Traveler Segments	8
Summary	11
For More Information	11
<i>The Cultural Traveler 2010 Guidebook</i>	12

Introduction

The primary objective of MSA’s travel and tourism white paper series is to provide education and resources to increase visitation to museums and increase business at museum stores.

The MSA tourism white papers preceding this issue have provided strategies to better understand the link between retail and cultural tourism to build your organization’s tourism business. The content provides measurable and actionable steps to take full advantage of the many opportunities to position cultural and heritage attractions in the global tourism arena. This white paper reports on the results of a market research study conducted in 2009 that is the first of its kind in defining the cultural and heritage traveler.

MSA’s Tourism White Paper Series

1. “Tourism 101: Basic Information for Selling to Tourists” provides an introduction to tourism marketing and glossary of terms.
2. “Partnership Strategies for Building Tourism Business” covers ways to leverage tourism marketing partnerships to increase your business.
3. “Public Relations and Special Events to Build and Track Tourism Business” discusses the power of public relations and promotions and how to cost-efficiently build your tourism business.
4. “Online Travel and Tourism Marketing Strategies” details the power of online strategies to integrate cultural and heritage attractions into travel packages at little or no cost, for optimal exposure and incremental business.
5. “Train Your Team to Be Tourism Ambassadors” provides a blueprint for training your staff to be more tourism focused, producing incremental sales along with enhanced job satisfaction.
6. “Driving Cultural Tourism in Challenging Times” provides insight and ideas on building business during an economic downturn, including proven strategies like partnering with AAA and innovative new ways to create and market cultural packages online.

Key Tourism Concepts Review

- Shopping, dining and cultural heritage experiences are the top tourism activities in America.
- Tourists spend more than local shoppers; international guests spend up to 10 times more.
- Domestic and international travelers offer exceptional opportunities to increase retail sales in stores at cultural institutions.
- Tourism is one of the top global growth industries.
- Tourism is a long-term business-building strategy in which you need to invest time and effort to develop win / win relationships.
- Tourists shopping in stores at cultural institutions view their purchases as an enhancement and extension of the total museum visit.
- Targeted PR and events are tools to cost-effectively reach and attract high-spending tourists.
- Media communications can help to position your store and museum as a leading tourism attraction in your community.
- Tracking your store’s tourism sales and reporting data to your organization’s stakeholders is essential to developing long term sales increases via travel and tourism.
- More than 50 percent of all Americans book their travel online and more than 64 percent research their travel online.
- To attract more traveling visitors, it is critical to develop and maintain your organization’s presence on major online travel channels.
- Inclusion of museums and museum stores in travel packages sold online by a wide variety of resources results in exceptional online exposure at little or no cost.
- Training your team to be tourism ambassadors, to welcome and engage the traveler, is a cost-effective way to build and track your tourism business.
- During challenging economic times, there are many opportunities to expand your business through creative tourism marketing, partnerships and online marketing.
- Research that helps to define and provide more data on the travel preferences and behavior of cultural and heritage travelers is valuable for increasing understanding and building success.

PDFs of all MSA tourism white papers are provided to the media free of charge through www.ShopAmericaTours.com/media. MSA members should contact the Museum Store Association at (303) 504-9223 for printed copies.

What Is Cultural and Heritage Travel?

Are you a cultural and heritage traveler? Do you enjoy reading research studies? Some research can be rather dry reading unless you're really into marketing and numbers. However, the study you'll read about in this white paper is actually fun, with extremely interesting findings. To take full advantage of the study, think of it as a personality quiz and try to determine which of the five cultural and heritage traveler segments best describes you, your friends and family. I like to think of myself as a "Passionate" cultural

and heritage traveler, as after all I am in the business and pursue it with passion. This was recently validated as I stood in line for more than one hour for tickets so that my family and I could enjoy Chicago's wonderful Museum of Science and Industry. I looked around at all those other cultural travelers in line — thousands of bright, eager, diverse, educated, curious and very nice people — as we all waited patiently, and I had to agree wholeheartedly with the findings of this study. Yes, there are millions of cultural and heritage travelers, many are passionate, and this trend is only going to grow in the future.

Cultural & Heritage Travel:
"Travel to experience the places, people, activities and things that authentically represent the past and present, including cultural, historic and natural resources."

As to defining ourselves as cultural travelers, that's another interesting phenomenon. My brother Kevin and his family were visiting from Iowa over the holidays, and as he perused a copy of *The Cultural Traveler* guide that he found on my coffee table, Kevin said casually, "Now this is me, I am a cultural traveler." I could not have been more surprised. Okay, so he's a professor at the University of Iowa, he's well educated and travels on business quite a lot, but his primary non-work interests include hunting, fishing, sports and other guy things. I would never in a million years have thought of Kevin as a cultural traveler or that he would articulate this himself. Yet, as our family outings included the Saint Louis Zoo and Saint Louis Science Center, I came to see Kevin in a new way, as one of the "Self-guided / Accidental" cultural travelers profiled in the study. It was a revelation.

We trust that this white paper will provide you and your colleagues with new revelations and deeper understanding of all segments of the cultural and heritage traveler and their importance in building your museum attendance, museum store business and tourism overall.

New Research Underscores Popularity of U.S. Cultural and Heritage Travel

The Cultural & Heritage Traveler Study, conducted in 2009 among U.S. domestic travelers, reveals that **78 percent of all U.S. leisure travelers participate in cultural and / or heritage activities while traveling**, translating to 118.3 million adults each year. With cultural and heritage travelers spending an average of \$994 per trip, they contribute more than \$192 billion annually to the U.S. economy.

"We discovered that an impressive number of U.S. travelers seek out cultural and heritage experiences," said Helen Marano, director of the Office of Travel and Tourism Industries, U.S. Department of Commerce. "With 78 percent of all domestic leisure travelers participating in cultural and heritage activities, their expenditures confirm that this is a strong market, and they are contributing significantly to our communities during these challenging economic times."



The study is the first to segment cultural and / or heritage travelers, showing the diverse groups that exist within this broader category of traveler. The segmentation analysis uncovered five different types of cultural and heritage travelers: Passionate, Well-rounded, Aspirational, Self-guided and Keeping it Light. Three segments — Passionate, Well-rounded and Self-guided — were more serious about their travels and said that cultural and heritage activities had a greater impact on their destination choice. Together, these three segments represent 40 percent of all leisure travelers and contribute nearly \$124 billion to the U.S. economy.

Cultural and heritage travelers as a whole are more frequent travelers, reporting an average of 5.01 leisure trips in the past 12 months versus non-cultural and heritage travelers with 3.98 trips. They also are more frequent business travelers and are more likely to have taken an international trip in the past 12 months than their non-cultural and heritage counterparts. More than half of travelers agree that they prefer their leisure travel to be educational and nearly half said they spend more money on cultural and heritage activities. They also are likely to travel further to get the experiences they seek: about half of most recent overnight leisure trips were 500 miles or more from home. More than a third say they traveled between 100 and 300 miles for a day trip.

“This is the first study to segment this market,” said Sheila Armstrong, executive director of the U.S. Cultural & Heritage Tourism (USCHT) Marketing Council. “While we suspected that most leisure travelers participated in some cultural activities, this study identifies the passionate cultural and heritage travelers — those for whom culture and heritage drive their destination choices — as well as the more casual cultural traveler. The study helps us understand what travelers consider when making destination and spending choices.”

The study found that cultural and heritage travelers are more likely to participate in culinary activities, such as sampling artisan food and wines, attending food and wine festivals, visiting farmers’ markets, shopping for gourmet foods, and enjoying unique dining experiences as well as fine dining.

Other cultural and heritage activities identified by travelers include: visit historic sites (66 percent); attend historical re-enactments (64 percent); visit art museums / galleries (54 percent); attend an art / craft fair or festival (45 percent); attend a professional dance performance (44 percent); visit state / national parks (41 percent); **shop in museum stores (32 percent)**; and explore urban neighborhoods (30 percent). The vast majority of these travelers (65 percent) say they seek travel experiences where the “destination, its buildings and surroundings have retained their historic character.”

“This study of the habits of cultural and heritage travelers reconfirms the size of this lucrative market,” said Scott Gerloff, president and CEO of Heritage Travel / National Trust for Historic Preservation, the study’s lead sponsor. “It also shows that cultural and heritage travelers seek authentic destinations with historic character as well as educational experiences in their travels.”

The Cultural & Heritage Traveler Study was conducted online by Mandala Research among 1,048 leisure travelers in the United States from July 10 through July 20, 2009. To qualify for the survey, respondents must have taken at least one trip in the past 12 months for pleasure, vacation or personal purposes within the United States and at least 50 miles away from home one-way, or, where the traveler spent at least one overnight and had shared or had sole responsibility for travel planning.





The sample for the survey was balanced from the start by age, gender, geographical region, race and ethnicity according to the latest population parameters reported by the U.S. Census Bureau.

Laura Mandala, managing director of Mandala Research, explained the methodology: “This study surveyed a nationally representative sampling of leisure travelers who identified themselves as cultural and heritage travelers. We first asked travelers if they had heard of the term ‘cultural or heritage traveler,’ then asked them to define what they thought the term meant. Later in the study we provide them with a definition of a cultural and heritage traveler and asked how well that statement described them. Based on their answers to these questions and the behaviors and attitudes they reported, we have identified a range of types of cultural and heritage travelers. This study sheds light for the travel industry, as well as for museum and cultural professionals, on who these travelers are and how they think of themselves, ultimately guiding marketing and communications efforts to reach these travelers.”

Research objectives included:

- Understand how travelers think about cultural and heritage travel; how they define it and how they define themselves as travelers.
- Identify the range of cultural and heritage traveler “types” through segmentation.
- Understand the behaviors of the cultural and heritage leisure traveler.
- Learn what is important to cultural and heritage travelers and their attitudes toward travel.
- Quantify the economic impact of the cultural and heritage leisure traveler.

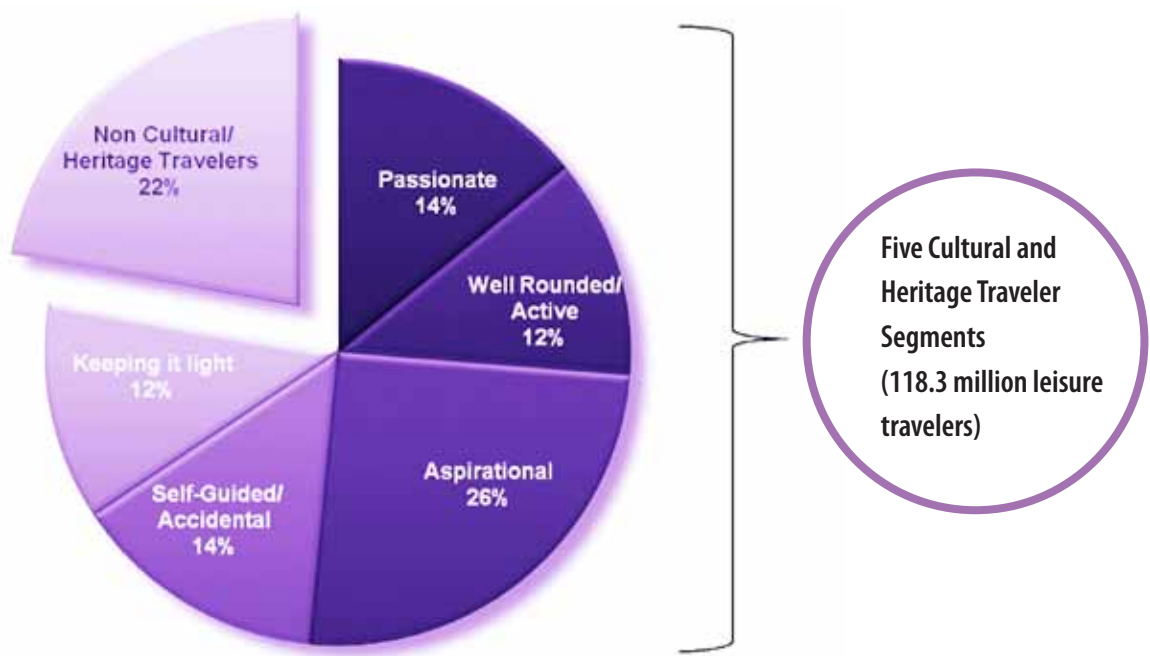
15

15 Most Significant Findings

1. Seventy-eight percent of all leisure travelers, or 118.3 million U.S. adults, are cultural and heritage travelers.
2. Thirty-six percent of survey respondents have heard the term “cultural and heritage traveler.”
3. Cultural and heritage travelers spent an average of \$994 on their most recent leisure trip versus \$611 spent by non-cultural and heritage travelers.
4. In 2009, cultural and heritage travelers had an estimated economic impact in the United States of \$192.3 billion.
5. Although they demographically skew slightly older, cultural and heritage travelers are more educated and have higher household incomes; they represent all demographic groups.
6. More frequent leisure travelers, cultural and heritage travelers report an average of 5.01 trips in the past 12 months versus 3.98 of non-cultural and heritage travelers.
7. Cultural and heritage travelers are more frequent business travelers and are more likely to have taken an international trip in the past 12 months.

8. Cultural and heritage travelers are more interested in experiences where the destination, its buildings and surroundings have retained their historical character.
9. Explorers of different cultures, cultural and heritage travelers desire to learn more about history and stimulate their minds; they like to be intellectually challenged by leisure travel.
10. More than half (58 percent) of cultural and heritage travelers want an educational experience when traveling for leisure.
11. Cultural and heritage travelers are more likely to participate in a wide range of leisure travel activities, visiting museums and historical sites, participating in culinary activities, attending food and wine festivals, visiting farmer's markets, and enjoying unique dining experiences as well as fine dining.
12. Nearly half (45 percent) of cultural and heritage travelers strongly / somewhat agree that they spend more money on cultural and heritage activities on a leisure trip.
13. More than one-third (37 percent) of cultural and heritage travelers will pay more for lodging that reflects the culture and heritage of the destination they are visiting.
14. An estimated 24 percent of all leisure travelers will take a cultural and heritage trip in the next 12 months. This equates to 36 million U.S. leisure travelers.
15. Cultural and heritage travelers are dedicated shoppers at museum stores (32 percent). They also shop outlets, galleries, unique / authentic retail and traditional retailers and brands.

118.3 million leisure travelers (or 78% of all leisure travelers) participate at some level in cultural and heritage activities while on a leisure trip.



**U.S. Adult Total Leisure Traveler Population
(152 million)**

10

Top 10 Cultural and Heritage Activities

Attended cultural and / or heritage fair or festival	68%
Visited heritage buildings / historical buildings	67%
Visited historic sites	66%
Visited Native American sites	64%
Attended historical re-enactments	64%
Visited history museums / centers	61%
Visited living history museums	60%
Participated in an organized tour of local history or culture	59%
Visited natural history museums / centers	59%
Visited art museums / galleries	54%

5

Five Defining Cultural and Heritage Traveler Segments

This study segmented leisure travelers into five groups based on the level of influence cultural and heritage activities played in their travel decisions. The segments are mutually exclusive and collectively exhausted. Respondents were assigned to a segment based on the results from a cluster analysis. The five segments that participate in cultural and heritage activities are defined as follows.

Passionate

Passionate: They seek out cultural and heritage trip activities as they have a strong desire to participate in these when they travel.

- Group includes 14 percent of leisure travelers or 21.4 million.
- Represent all demographic groups but are statistically more likely to be male, belong to the Silent / GI generation, hold a graduate / professional degree and have a household income of \$100k+.
- Cultural and heritage activities are a key driver in their destination choice.
- They travel more often and are more likely to take long weekends (three to four days) rather than longer cultural and heritage trips.
- When planning a leisure trip, they are most likely to use the Web sites of the destination (77 percent).



Well-rounded / Active

Well-rounded / Active: They are open to experiencing all types of activities while on a leisure trip.

- Group includes 12 percent of leisure travelers or 18.4 million.
- Represent all demographic groups but are statistically more likely to be male, belong to GenX, hold a graduate / professional degree and have a household income of \$100k+.
- Cultural and heritage activities are a key driver in their destination choice, though they are open to experiencing all types of activities while on a leisure trip.
- Eighty-one percent strongly / somewhat agree that they seek travel experiences where the destination, its buildings and surroundings have retained their historic character.
- When planning a leisure trip, they are most likely to use general Web searches (54 percent) and friends and family members (51 percent). And they are more likely to look for packaged deals.
- Like the Passionate and Aspirational segments, they are more likely to pay more for lodging that reflects the culture / heritage of the destination.



Aspirational

Aspirational: They desire to participate in cultural and / or heritage activities, but have limited experiences during their most recent trip and during the past three years.

- Group includes 25 percent of leisure travelers or 38.2 million.
- Represent all demographic groups but are statistically more likely to be female, belong to the Boomer generation and hold a high school / GED degree.
- They desire to participate in cultural and heritage activities but have not done so on their most recent leisure trip and / or a leisure trip in the past three years.
- Eighty-four percent strongly / somewhat agree that they like to bring back local / regional memorabilia from the places they visit, sharing them with their friends and family.
- Ninety-eight percent think it's very / somewhat important to choose activities on their leisure trips that are relaxing and relieve stress.
- Along with Passionate and Well-rounded travelers, they are more likely to say they will pay more for lodging that reflects the local culture and surroundings.



Self-guided / Accidental

Self-guided / Accidental: They take advantage of cultural and heritage activities while on a leisure trip, but cultural heritage activities are not the driver for this group's destination choices. They most often prefer exploring small towns, galleries and self-guided historical tours.



- Group includes 14 percent of leisure travelers or 21.4 million.
- Represent all demographic groups but are statistically more likely to be male, belong to GenX and the Silent / GI generation, and live in the West / Midwest census regions.
- They prefer taking advantage of cultural and heritage activities that they can guide themselves through (museums, exploring small towns, historical sites, etc.).
- Seventy-six percent strongly / somewhat agree that they seek travel experiences where the destination, its buildings and surroundings have retained their historic character.
- Ninety-four percent think it's very / somewhat important to choose activities on their leisure trips that create lasting memories.
- They are more likely to take a week-long cultural and heritage trip, rather than shorter trips, and they are more likely to start their trip planning without a specific date or destination in mind.

Keeping it Light

Keeping it Light: They don't seek out cultural heritage activities, but will attend what they perceive as fun art, cultural and musical events.

- Group includes 12 percent of leisure travelers or 18.4 million.
- Represent all demographic groups but are statistically more likely to be female, belong to the Boomer generation and live in the Midwest census regions.
- Cultural and heritage activities are not a driver of their destination choice. Rather, they take advantage of the activities that are available once they arrive in a destination.
- Their cultural and heritage trips are more likely to be weekend getaways rather than longer trips.
- They prefer taking advantage of cultural and heritage activities that they can guide themselves through (museums, exploring small towns, historical sites, etc.).
- Eight-six percent strongly / somewhat agree that they prefer taking trips that are a combination of a wide variety of activities, such as culture, shopping, nature, exercise and dining.
- Ninety-two percent think it's very / somewhat important to choose activities that enrich their relationship with their spouse, partner and / or children.



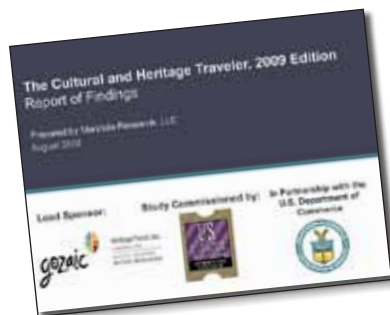
Summary

The cultural and heritage traveler is a large, affluent market. Segmentation and greater understanding of traveler behavior, preferences and needs can lead to more effective marketing success in attracting this traveler.

- Market size: 118.3 million adults annually (78 percent of leisure travelers)
- Spend more: \$994 versus \$611
- Travel more frequently: 5.01 versus 3.98 trips in the last year
- Stay longer: Average six nights per trip
- Shop at museum stores: 32 percent of all cultural and heritage travelers; 84 percent of the Well-rounded / Active segments; 72 percent of the Passionate segment



For More Information



The in-depth 131-page PDF version of The Cultural & Heritage Traveler Study is available for purchase from Mandala Research for \$350, or at a \$175 discount rate for members of the Museum Store Association, American Association of Museums and the U.S. Cultural & Heritage Tourism Marketing Council. Checks and credit cards accepted. To order, please contact Laura Mandala at Laura@MandalaResearch.com or call (703) 820-1041.

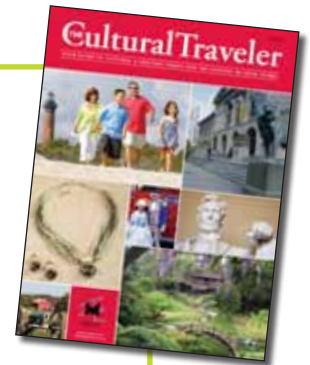
An expert presenter from the U.S. Cultural & Heritage Tourism Marketing Council, or one of our partners, is available to present a PowerPoint on “The Cultural & Heritage Traveler Study and Why Tourism Matters” at meetings and conferences with 25 or more attendees. The only cost is reimbursement of the speaker’s approved travel expenses. For more information please contact Sheila Armstrong at USCHTMarketing@aol.com.

The Cultural & Heritage Traveler Study was conducted by Mandala Research for the U.S. Cultural & Heritage Tourism Marketing Council, in conjunction with the U.S. Department of Commerce / Office of Travel & Tourism Industries. Heritage Travel Inc., a subsidiary of The National Trust for Historic Preservation, and its Web site www.gozaic.com, was lead sponsor of the study. Other sponsors include: American Association of Museums; California Travel and Tourism Commission; Center for Socioeconomic Research and Education at Texas A&M University; Chicago Office of Tourism; Positively Cleveland; Visit Florida; Conde Nast; The History Channel Magazine; Marriott International; Museum Store Association; Sarasota and Her Islands Convention and Visitors Bureau; Shop America Alliance; Vantage Technology Partners; and the Virginia Tourism Corporation.

The Cultural Traveler 2010 Guidebook

This exciting and informative new full-color publication features 52 pages of leading museum stores and cultural travel destinations in a user-friendly, advertorial travel guide format. View the digital version online at www.museum-store.travel and www.TheCulturalTraveler.com.

Global distribution is provided by Gray Line Worldwide and Shop America Tours with local distribution by participating museum stores. Watch for more details on how to be part of the 2011 edition of *The Cultural Traveler* guide or contact USCHTMarketing@aol.com or the Museum Store Association.



www.MuseumStoreAssociation.org



www.ShopAmericaTours.com



www.uscht.com

© 2010 Museum Store Association Inc. and Shop America Alliance. All rights reserved. No part of this document may be reproduced or used in any form or by any means, electronic or mechanical, including photocopying, recording or by any information storage and retrieval system, without permission in writing from SAA and MSA.