



Heritage and Cultural Visitors

An NTC White Paper



An Affluent and Engaged Market

Overall heritage and cultural visitors represent a huge and affluent market. Most have college degrees or some college. They travel frequently, taking an average of 5 trips per year, vs. 3.5 for traditional sightseeing visitors. Recent studies by Travel Oregon indicate an average spend of \$2,497 per trip, more than triple the spending of outdoor recreation visitors. Many do not even set a budget, feeling the experience they want to have far outweighs the need to pinch pennies.

Some older heritage and cultural visitors may have moved past the recreationally active phase of travel, due to age, obesity, or exhaustion, yet still want to engage to fill their minds and immerse their senses. They may not be able to climb mountains, but give them a destination story and they will use it to push away thoughts of work and home for a few hours or a few days. They often book into accommodations that reflect the historic character of the destination, seek out work by local artisans to find that perfect piece to take home, and eat in local restaurants all the way from the best cuisine to the diner.

All along the way, they are communicating with their spouse or traveling companions about what they are seeing and doing. Conversation at a historic site leads to more conversation at dinner, reflecting on what they learned, which leads to more conversation about which special art piece to take home and so on. During all this time while they are connecting with family and friends, the awareness of time slips away, life goes with the flow and the mind relaxes. As a result, they demand the precise experience they want to get involved in, and will never be satisfied with pre-formed packages based just on the offerings of selected members.

A Tour Operators Observations

A tour operator who has served heritage and cultural visitors for years, described them as:

1. Americans like driving to explore interesting places and historic towns and villages, but want to have lots to see and do and/or an iconic attraction along the route.

2. Americans like ancient sites, historic properties, stately homes and gardens and architecture, coupled with human interest stories or an iconic story more than straight history.
3. They like easy short distance but scenic walking trails that deliver learning about local history, culture and monuments/buildings.
4. They like events that bring history and its stories to life but prefer authenticity, and less busy and not touristy spots.
5. They enjoy experiences that link to history, but most are not particularly interested in religion.
6. American visitors like to absorb the history, atmosphere and 'culture' of a region through attractions, architecture, towns and villages, as well as local pubs and cafes.
7. They like having a wide range of things to do to make the most of their trips.
8. Americans like to enjoy local foods and hospitality.
9. Americans like opportunities to relax, enjoy landscape, picturesque views and immersion in nature but don't like extremes. Coastal, island and water-based experiences including marine life need to be easily accessible and not too strenuous to explore.
10. They enjoy driving routes with interesting places to explore such as seaside towns, historic villages with lots to see and do including iconic attractions or scenery on the routes.

Pollster Lou Harris Reflects

Pollster Louis Harris synopsized indicate heritage and cultural visitors as:

- well educated - most are college educated, many have advanced degrees, and educational levels are the single most significant factor that influences cultural and heritage travel.
- older – participation in heritage and cultural tourism peaks between age 45 and 65, when people are at the height of their careers, earning power, and discretionary income.
- influenced by women – women typically plan family vacations and other trips and control more personal discretionary income to book and spend on heritage and cultural tourism.
- well-traveled - these visitors are just as likely to have traveled overseas as in the U.S.
- well-informed - discerning visitors are looking for value for the dollar, yet want experiences that meet their expectations.
- generous – visitors to historic and cultural sites spend at least \$62 more per person, per day on items such as antiques, art, gourmet food, wine, and health food than traditional sightseeing visitors.
- open to alternative accommodations - more are inclined to stay in bed and breakfasts and other unique lodging properties.
- take more time for each trip - these visitors are more inclined to stay longer and explore more thoroughly.
- more likely to visit a diversity of sites, towns, and regions.
- accustomed to high quality services – looking for quality infrastructure and appropriate services.

- interested in authenticity – seeking out experiences to learn about a community’s history and culture.
- seeking unique and enriching travel experience that combines education, entertainment, and authenticity.

Top Activity Preferences

The top activity preferences of heritage and cultural visitors include visiting:

79% Heritage centers

78% Historic houses

64% National Parks

58% Monuments

49% Museums and galleries

49% Gardens

49% Shopping

48% Ancient sites

9% Festivals

7% Churches

5% Genealogy



The Mandela Landmark Heritage and Cultural Travel Study

Laura Mandela conducted the most extensive research on heritage and cultural visitors and we'll give her credit here for the best descriptions of the various visitor market segments.

14% - 22 Million Adults - Passionate Heritage and Cultural Visitors

The most avid heritage and cultural visitors who actively seek out heritage and cultural trip activities and have a strong desire to participate in them when they travel. Even though they represent all demographic groups, they are most likely to

belong to older generations, hold a graduate or professional degree and have a household income over \$100K. The heritage and cultural activities available at a destination are a key driver in their choice of where they visit. They travel more often and are more likely to take multiple long weekends (3-4 days) than long trips. When planning a trip, 77% of this segment use the website of the destination to determine the quality of the heritage and cultural offerings at the destination and will pay more for accommodations that reflect the heritage/culture of the destination. They gather their information from destination websites, friends and family and general web searches. They also read user generated sources more than any other segment and are much more likely to read community newspapers. They are more likely to refer to Trip Advisor than other segments.

12% - 18.4 million adults - Well Rounded Heritage and Cultural Travelers

Even though they are open to experiencing all types of activities while on a leisure trip, heritage and cultural activities are a key driver in their destination choice. 81% strongly or somewhat agree that they seek travel experiences where the destination, its buildings and surroundings have retained their historic character. They also cut across all demographics and are more distributed throughout the visitor pool, statistically more likely to hold a graduate or professional degree and have households incomes over \$100K. When planning a leisure trip, 54% are most likely to use general web searches and 51% refer to the experiences of friends and family members. They are more likely also to pay more for lodging that reflects the heritage/culture of the destination. This segment is also more likely to consult Trip Advisor than other segments, except for the Passionate segment.

26% - 38.2 million adults - Aspirational Heritage and Cultural Travelers

This segment desires to participate in heritage and cultural activities, but have limited experience with them during their past three years of trips. 84% strongly agree that they like to bring back local/regional memorabilia from the places they visit, sharing them with family and friends. 98% think its very important to choose activities on leisure trips that are relaxing and relieve stress. They too are more likely to pay for accommodations that reflect the heritage/culture of the destination if they become aware of them. They span all demographic groups but are more likely to be female and Baby Boomers.

14% - 21.4 million adults - Self-Guided Heritage and Cultural Travelers

This segment takes advantage of heritage and cultural activities while on a leisure trip, but these activities are not the specific drivers of their destination choice. They prefer to take advantage of heritage and cultural activities they can guide themselves through - museums, exploring small towns, historic sites and galleries and taking self-guided historical tours. They represent all demographic groups but are statistically more likely to live in the West and Midwest. 76% strongly agree that they seek travel experiences where the destination, its building and surroundings have retained their historic character. 94% believe that it is very/somewhat important to choose activities on leisure trips that create lasting memories. This segment is more likely to take a week-long heritage or cultural trip, rather than short trips and are more likely to start trip planning without a specific date or destination in mind.

12% - 18.4 million adults - Keeping It Light Heritage and Cultural Travelers

Heritage or cultural activities are not a driver of the choice of where they visit, rather they take advantage of these activities that are available once they are at the destination. The trips that include heritage and cultural activities are more likely to be weekend getaways rather than long trips and they also prefer to take advantage of heritage and cultural activities they can guide themselves through such as museums, small towns and historic sites. They represent all demographic groups, but statistically are more likely to be female, Boomers and reside in the Midwest. 86% strongly agree that they prefer taking trips that are a combination of a wide variety of activities such as culture, shopping, nature, exercise and dining.



When Heritage and Cultural Visitor Explore

92% want to relax and relieve stress, making it very important that planning, booking and experiencing a trip must be completely stress free.

90% want to create lasting memories, so all experiences should include the ability to participate, engage, and interact, to enable these visitors to truly experience the authenticity of the destination and connect with their traveling companions. This is not something that can be manufactured, it must be genuine.

87% want to try new experiences and are happy to get outside of their comfort bubble a bit and more than willing to try new things that are not physically stressful.

82% want to use a trip to enrich their relationship with spouse/partner/children, so providing the opportunity for conversation and communication is critical since a trip may be the only time they have had to communicate about things of interest with a spouse or significant other, without interruption, since their last trip. The more the communication flows with companions, the more satisfying the trip.

75% want to discover stories to share back home, they enjoy telling friends and family about their destination experiences, so it is important to leave them with great stories to tell back home.

75% want to explore a different culture, a phrase often applied to destinations overseas, but that also applies to ethnic groups and unique circumstances in America as well.

75% want to learn more about local history and culture. They are truly intrigued by local history, great stories about local heroes and citizens, and the nuances of past lives.

74% want to be intellectually stimulated and challenged, which includes the ability to learn new things and have minds changed and values challenged.

68% want outdoor activities included: Even though these visitors are not going to engage in extreme sports and mountain biking, most enjoy strolling on hiking paths, in heritage gardens, and other pleasant outdoor places.

50% will pay more for lodging that has a distinctive cultural or heritage component, such as location in a historic building, displays of local art, or unique architecture.

30% of adults state that specific arts or a cultural or heritage event influenced their choice of destination on their last trip.

Visit Florida states that more than two-thirds of their 130 million visitors a year participate in one or more heritage or culturally-based activities during their stay.

Their Trip Planning Process

It is very important for DMMOs to reach heritage and cultural visitors on social media and other message platforms to communicate with them prior to their travel decisions. 80% start planning with a destination in mind and fortunately, when they do, they go straight to the destination website for information. 29% start trip planning by considering a specific event or events, and 23% start with a certain type of travel experience in mind. Another 13% start with travel dates and no particular destination in mind enabling DMMOs to appeal to these visitors who are searching for the right experience. And an additional 13% start trip planning in other ways, often talking with family and friends about the experiences they have had at various locations. 7% looked for package deals with no destination in mind. Only about a quarter book well in advance of travel, pointing out that even these visitors have a challenge in planning their lives and trips. 5% booked the same day of the trip and 8% within 4-6 days, 7% booked more than 6 months in advance, and 16% booked between 3-6 months.

86% consult Trip Advisor

61% consult the websites of destinations, higher for some segments

57% ask friends and family

52% do a general Google search

34% access third party websites

30% read brochures and other printed destination information

27% refer to official sources of the destination

27% read travel related magazines

21% read independently republished reviews

20% reference user generated sources