

The Cultural and Heritage Traveler, 2009

Executive Summary



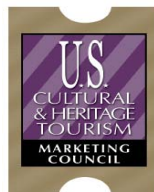
Mandala Research, LLC

Market Research, Public Polling, Policy Analysis

Lead Sponsor



Study Commissioned by



In Partnership with



Office of Travel and Tourism Industries, U.S. Department of Commerce

Research Conducted by Mandala Research, LLC

The USCHT Marketing Council's primary purpose is to market and promote cultural and heritage experiences to travelers to and within the United States through online packaging at www.TheCulturalTraveler.com . To learn more about the USCHT Marketing Council, please visit www.uscht.com.

Heritage Travel, Inc. offers the premier online community presenting the broad range of heritage destinations, sites and events that define our collective past and enrich our lives. The company's innovative website – Gozaic.com – provides a powerful travel planning resource for heritage and cultural travelers as well as an online community where people can find and share heritage- and culture-rich experiences. Based in Washington, D.C., Heritage Travel is a for-profit subsidiary of the National Trust for Historic Preservation. For information, visit www.gozaic.com or contact Scott Gerloff at 202.588.6200 or HTI_Partner@gozaic.com.

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- This study surveyed the U.S. leisure population to determine what proportion of leisure travelers can be identified as “cultural and/or heritage” leisure travelers. In addition, the study investigated the various types of cultural and/or heritage travelers that exist within the broader category of cultural and heritage tourism.
- This study found that about 8 in ten leisure travelers participate in cultural and heritage activities, or **78% of all U.S. leisure travelers** (approximately 118.3 million U.S. leisure travelers).
- Annually, **\$192.3 billion (USD)** can be attributed to the 78% of leisure travelers that are identified as cultural and/or heritage travelers.
- The average trip spending by cultural/heritage travelers is **\$994**, compared to \$611 for other leisure travelers. For both types of leisure travelers, however, about half of their expenditures are spent on activities, dining and shopping they participated in while traveling.
- 30% of all travelers say they have heard of the term ‘cultural and heritage traveler’ and they give a wide range of descriptions as to what the term may mean. Among those who are classified as cultural/heritage travelers, **36% have heard the term “cultural and/or heritage traveler.”** Among those who are not cultural/heritage travelers, 11% have heard of this term.
- Cultural and heritage travelers represent all generations, and education and income levels, however, there are some segments of these travelers who skew slightly older, more highly educated, and with higher household incomes.
- The segmentation analysis of travelers uncovered five different types of cultural and heritage travelers: Passionate, Well-Rounded/Active, Aspirational, Self-Guided/Accidental, and Keeping it Light. The “core” cultural/heritage travelers are the Passionate, Well-rounded and Self-Guided segments. The “core” cultural/heritage travelers represent 40% of all leisure travelers, or 61.2 million travelers, and have an economic impact of \$123.6 billion.

- Cultural and heritage travelers are more frequent travelers, reporting an average of 5.01 trips in the past 12 months, vs. 3.98 for those who are not cultural/heritage travelers. They are also more frequent business travelers and are more likely to have taken an international trip in the past 12 months than their non cultural/heritage counterparts.
- Cultural/Heritage travelers are more likely to participate in a wide range of leisure travel activities. Outside of traditional cultural/heritage activities such as museum attendance and historical sites, these travelers also participate in culinary activities, such as sampling artisan food and wines, attending food and wine festivals, and visiting farmers' markets, shopping for gourmet foods, and enjoying unique dining experiences as well as fine dining.
- When selecting a destination for their most recent leisure trip, 61% of cultural/heritage travelers said they started with a desired location in mind; nearly one in three (29%) started considering specific events they wanted to do to select their destination.
- Cultural/Heritage travelers are long-term planners: over half (53%) stated that they booked their most recent leisure trip 1+ months before taking it.
- 59% of cultural/heritage travelers used their own automobile as their primary transportation vehicle on their most recent trip.
- 51% of cultural/heritage travelers stayed in a hotel/motel/resort on their most recent trip.
- Interest in experiences where the destination, its buildings, and surroundings have retained their historical character and who desire educational experiences in their travel, as well as lodging that reflects the local culture, are more likely to say they plan to take a cultural/heritage trip in the next 12 months.
- Similarly, travelers who desire to explore a different culture, learn more about history and local culture and to stimulate their minds and be intellectually challenged by leisure travel are also more likely to say they will take a cultural/heritage trip in the next 12 months.
- An estimated **23.58%** of leisure travelers will take a cultural/heritage trip in the next 12 months, which is approximately 36 million U.S. leisure travelers.

Methodology

The Cultural/Heritage traveler study was conducted online by Mandala Research among 1048 leisure travelers in the United States July 10-20th, 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 that was 50+ miles away from home one-way OR where the traveler spent at least one overnight and have shared or have sole responsibility for travel planning.

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

Response rate for the survey was 21%.

For More Information

Mandala Research is a source for travel and tourism market research needs. For comments/questions about this study, or to purchase the full report/data set, please contact:

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