



Downtown Revitalization Institute
Share Your Heritage: Developing &
Managing Cultural Heritage Tourism
Connecticut Main Street
March 12, 2010

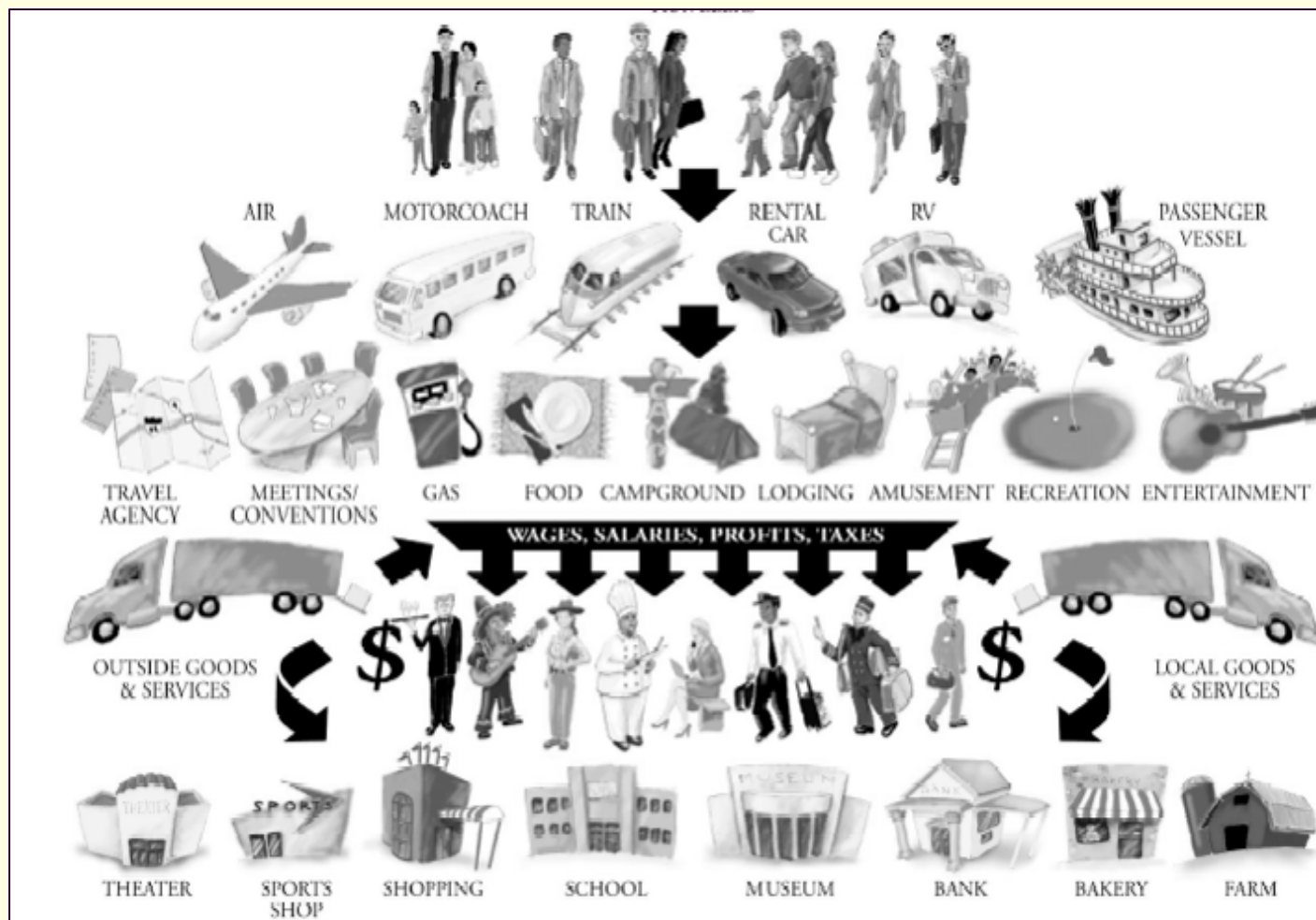
Using Cultural Heritage Tourism to
Help Your Downtown Survive the
Economic Downturn

Tourism is Big Business

- Contributed \$740 billion to the U.S. economy
- One of America's largest employers
- Directly employs more than 8 million people and creating a payroll income of \$178 billion
- Generates \$110 billion in tax revenue for local, state and federal governments

U.S. Travel Association, 2007

The Trickle Down Effect...



Travel Industry Association of America

How many cultural heritage travelers?

78% of all U.S. leisure travelers participate in cultural and/or heritage activities while traveling—

118.3 million travelers



*(The Cultural and Heritage Traveler,
Mandela Research, October 2009)*

Growth in Cultural Heritage Travel



Cultural heritage travel increased 13% between 1996 and 2002, more than twice the growth of travel overall (5.6%)

(TIA Historic/Cultural Traveler 2003 Edition)

Cultural Heritage Traveler Segments

- Passionate
- Well-rounded
- Aspirational
- Self-Guided
- Keeping it Light



*(The Cultural and Heritage Traveler
Mandela Research, October 2009)*

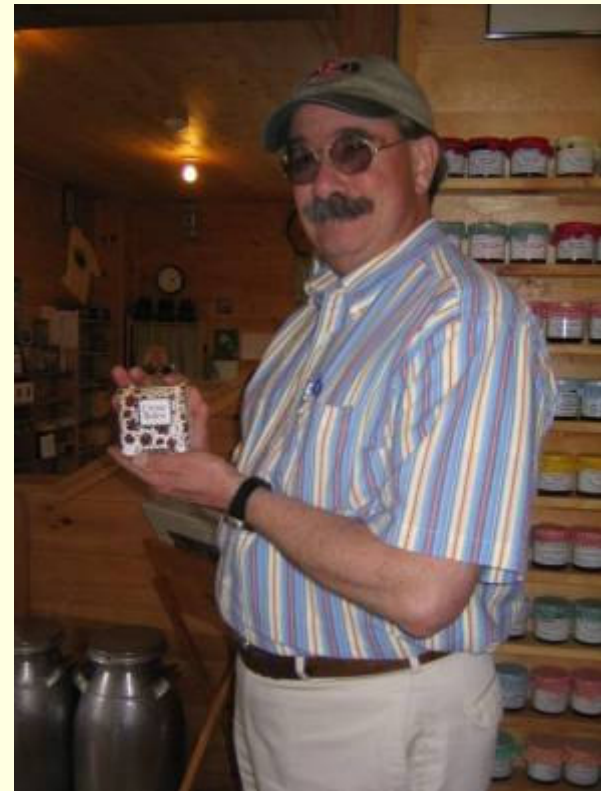
Economic Impact of Cultural Heritage Travel

- Cultural heritage travel contributes more than \$192 billion annually to the U.S. economy.
- Passionate, Well-rounded, and Self-guided segments represent 40% of all leisure travelers and contribute \$124 million to the U.S. economy.

Spending

Cultural heritage travelers spend, on average, \$994 per trip compared to \$611 for all U.S. travelers.

*(The Cultural and Heritage Traveler
Mandela Research, October 2009)*



Cultural heritage travelers like to shop



- 44% include shopping compared to 33% of all other travelers.
- Shopping is the most popular activity for all U.S. travelers.

(U.S. Travel Association)

SHOPPING

What do travelers want?

- Stores travelers do not have at home (73%)
- Items travelers cannot get at home (67%)
- Items that represent the destination travelers are visiting (53%)
- A unique shopping atmosphere (52%)

(Travel Industry Association of America)



Cultural Heritage Travelers Enjoy Many Activities

- 40% experienced local cuisine
- 39% visited historic sites
- 39% explored small towns
- 38% visited state/national parks
- 34% took a self-guided walking tour
- 32% shopped for local arts and crafts
- 28% visited art museums/galleries
- 25% visited natural history museums/centers



Interest in culinary activities



- Sampling artisan food and wines
- Enjoying unique dining experiences
- Attending food and wine festivals
- Visiting farmers markets
- Shopping for gourmet foods
- Fine dining.

More Frequent Travelers

- Cultural heritage travelers took 5.01 trips in the past 12 months versus 3.98 trips for other travelers.

Mode of Travel

Cultural heritage
travelers are most
likely to travel by car
(68%)

(Travel Industry Association)



Current National Trends in Tourism

1. Great American Time Squeeze
 - More Weekend Travel
 - Interest in Travel Packages & Itineraries
 - Use of Technology and the Internet
2. Aging Baby Boomers
3. Awareness of Carrying Capacity
4. Broadening Perspective of History
5. Escaping “Anyplace, USA”
6. Current Economic Downturn

Shorter Planning Time

55% of cultural heritage travelers plan their trips a month or less before their travels.

(Travel Industry Association)



Use of the Internet

- The Internet is the primary source for travel planning (30%) after friends and family (31.7%)
Destination Analysts Jan 2009

- 1 out of 5 travelers used a blog to read a review

- 30% used user-generated content (reviews, itineraries, etc.)

Destination Analysts, Ypartnerships, Randell Travel Marketing

Making Decisions After Arrival

- ❖ Restaurants (48%)
- ❖ Shopping (45%)
- ❖ Museum/exhibit (26%)
- ❖ Sightseeing tour (24%)
- ❖ Movie (16%)
- ❖ Theme park (15%)
- ❖ Religious service (14%)
- ❖ Live theater/performance (14%)
- ❖ Festival or parade (13%)
- ❖ Other activities/attractions (24%)

Current National Trends in Tourism

1. Great American Time Squeeze
 - More Weekend Travel
 - Interest in Travel Packages & Itineraries
 - Use of Technology and the Internet
2. Aging Baby Boomers
3. Awareness of Carrying Capacity
4. Broadening Perspective of History
5. Escaping “Anyplace, USA”
6. Current Economic Downturn

#2 Aging Baby Boomers

“Because boomers are more experienced travelers, they will expect more from their experiences and terms such as cultural tourism, heritage tourism, sports tourism, active tourism, adventure travel and ecotourism will be commonly used within the next decade.”

(National Tour Association, Group Travel Leader/December 1998)



Current National Trends in Tourism

1. Great American Time Squeeze
 - More Weekend Travel
 - Interest in Travel Packages & Itineraries
 - Use of Technology and the Internet
2. Aging Baby Boomers
3. **Awareness of Carrying Capacity**
4. Broadening Perspective of History
5. Escaping “Anyplace, USA”
6. Current Economic Downturn

Current National Trends in Tourism

1. Great American Time Squeeze
 - More Weekend Travel
 - Interest in Travel Packages & Itineraries
 - Use of Technology and the Internet
2. Aging Baby Boomers
3. Awareness of Carrying Capacity
4. Broadening Perspective of History
5. Escaping “Anyplace, USA”
6. Current Economic Downturn

#4 Broadening Perspective of History



Broadening Perspective of History

“For a long time the spotlight has been on only a relatively few people—white, male descendants of Western Europeans. Now the lights on the stage are coming up, revealing for the first time all of the others who have been on the stage all the time.”

David McCullough, historian

Current National Trends in Tourism

1. Great American Time Squeeze
 - More Weekend Travel
 - Interest in Travel Packages & Itineraries
 - Use of Technology and the Internet
2. Aging Baby Boomers
3. Awareness of Carrying Capacity
4. Broadening Perspective of History
5. Escaping “Anyplace, USA”
6. Current Economic Downturn

#5 Escaping “Anyplace, USA”



Current National Trends in Tourism

1. Great American Time Squeeze
 - More Weekend Travel
 - Interest in Travel Packages & Itineraries
 - Use of Technology and the Internet
2. Aging Baby Boomers
3. Awareness of Carrying Capacity
4. Broadening Perspective of History
5. Escaping “Anyplace, USA”
6. **Current Economic Downturn**

Is the Down Economy Affecting Travel?

Yes, but people still want to travel:

- 58% plan to travel same amount as last year
- 51% expect to spend the same

Destination Analysts: State of the American Traveler, January 2009

- Travel ranks 2nd to dining out as the leisure activity people try to afford
- 71.4% of U.S. adults plan to travel this year

Cheap Tickets.com/SmartMoney.com survey; U.S. Travel Association survey

Factors in choosing a destination:

65.7%	Affordability	18.5%	Outdoor recreation
54.3%	Safety	16%	Interesting culture
48.5%	Weather	15.2%	Good for kids
38.7%	Relaxing Place	13.7%	Historic attributes
36.4%	Scenic Beauty	9.1%	Shopping
36.2%	Lots to see and do	8.6%	Museums
33.3%	Easy to get there	6.1%	Nightlife
28.9%	Good hotels	4.3%	Golf
25.9%	Food and dining	3.7%	Spas

Destination Analysts: State of the American Traveler, January 2009

Travelers are finding ways to adapt

- 65.6% -Look for travel discounts or bargains
- 37.5% -Reduce number of leisure trips
- 33.2% -Visit less expensive destinations
- 28.0% -Take at least one “staycation”
- 27.5% -Shorten distance or reduce side trips
- 27.5% -Reduce number of total days
- 20.5% -Select less expensive transportation

Destination Analysts: State of the American Traveler, December 2008

The Economy: Still a Concern

Top reasons for not traveling:

- 66% - personal finances
- 57% - gasoline prices
- 33% airfare prices too high
- 27% too busy at work
- 19% - not enough vacation time

Destination Analysts, *State of the American Traveler Survey*, July 2009

