

## Key Trends in Cultural Tourism

Analysis of cultural tourism key trends and opportunities

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Overview

# What is Cultural Tourism?

## Definition of 'Cultural Tourism'

According to GlobalData, 'Cultural Tourism' is defined as tourism that offers travelers an opportunity to learn and develop their cultural understanding, through historical site visits, local crafts, cookery workshops, and arts. It also includes trips that enable tourists to connect with local communities in a typical location, and elements of religious tourism, such as pilgrimages.

## Why 'Cultural Tourism' is important?

Cultural tourism provides travelers an opportunity to have more distinctive souvenir experiences, which often gives them a sense of achievement. It creates opportunities for travelers to develop their potential by actively participating in local culture courses offered by tourist providers. However, there is no one typical consumer segment given the diversity in cultural tourists — they can be a group of individuals, a family, a couple, or solo travelers.

## 'Cultural Tourism' uses elements of creative tourism

Cultural tourism leans on creative tourism, such as arts and music, as this can be an innovative way to discover a foreign culture. Interest in gaining experience of a local culture by participating in creative and artistic activities offered by tourist providers is steadily increasing.

## 'Cultural Tourism' is aligned with pilgrimage tourism

In some senses, cultural tourism can be considered a modern form of pilgrimage tourism, which represents a specific type of cultural values and consumption. In other words, pilgrimage tourism is a subset of cultural tourism as both are interlinked with ancient devotional itineraries. Moreover, cultural and pilgrimage tourism meet the new needs of society demand as they offer opportunities to mingle, experience different cultures, build relationships, and empathize with hosting communities.

## Opportunities for tourism players

Tourism players such as hotels, airlines, and tour operators can cater to the needs of cultural tourists by developing creative cultural activities such as dance workshops, music sessions/jams, and painting courses, which enable them to boost their market revenue. For instance, 5Bogota<sup>2</sup>, a tour operator in Colombia, launched a creative program for travelers to showcase local values and experiences, which include 'salsa like a local', a 'coffee area tour', 'food by foot', and cooking lessons.

“  
The movement of people to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs.  
—Ashworth (1995), Richards (1996)<sup>1</sup>  
”

# Characteristics of Cultural Tourists

Seeking unique, authentic, and personal experiences



Looking to explore natural and preserved landscapes

Participating in creative or artistic activities to understand the local traditions



Looking for inter-cultural integration and more authentic accommodation



Spending a substantial part of their travel budget to gain unique local experiences



# Characteristics of Cultural Tourists

## Younger tourists are most likely to book a cultural trip

Globally, 24% of consumers say they are likely to book a cultural tourism trip in the coming year. This figure is heightened among younger consumers, however, who are generally more curious and well-traveled for their age than has been historically possible.

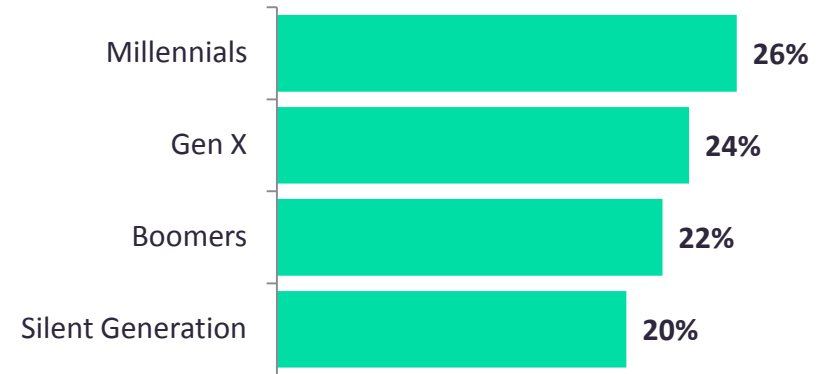
Additionally, higher earners are more likely to opt for cultural travel (34% of higher earners versus 29% of lower earners), showing that there is an ability and willingness to pay for special experiences that are more transformative and rewarding than traditional trips.

## Religious tourism is a smaller market, but has a more loyal consumer base

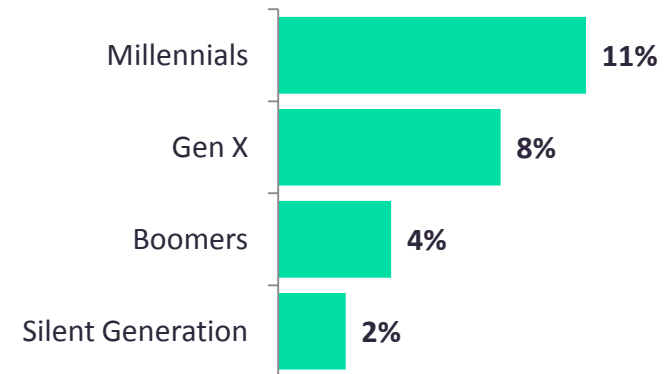
The same age-based trend can be observed in those who say they are likely to specifically go on a religious trip, though expectedly there is a much smaller proportion of the global population who would book this type of holiday. Despite this smaller audience, the nature of the travel means that customers are more loyal and destinations are more able to rely on this particular type of business than in other types of travel.

There are notable regional trends within religious travel, with 13% of travelers from Asia-Pacific and 26% of those from the Middle East or Africa planning on taking a religious trip. In Asia-Pacific, 32% of Indian respondents were likely to book a religious trip, pinpointing that certain source markets hold significantly better potential for the industry than others.

**Global: Which type of holiday are you likely to book in the coming year – Cultural**



**Global: Which type of holiday are you likely to book in the coming year – Religious**



Source: GlobalData's global consumer survey Q4-2017



Trend Opportunities

# Key Trends in Cultural Tourism

## Stay Like a Local

'Stay like a local' is a key trend among travelers seeking cultural authenticity as they look to have a more real local experience by sharing accommodation with locals, and include creative elements that can provide perspective with the goal of transforming travelers into more rounded human beings. It has been observed that millennials are actively interested in this type of tourism and mingle with local people to experience new cultures.

Peer-to-peer sharing site Airbnb<sup>3</sup> has expanded its offering and created a space for tourists seeking an authentic local experience by enlisting a number of hosts on its website to provide tours. These hosts engage<sup>4</sup> with consumers to provide a real local experience during their travels. It is an excellent opportunity for tourism players to capitalize on these travelers by partnering with local tourism players or guides who can add authentic, local elements to each trip.



Stay Like a Local

## Social Connectivity

Social connectivity is an emerging trend among cultural tourists as travelers show more concern towards social issues and are aware of the positive impact they can have. Tourism players are capitalizing on this segment by providing packages that are more explicitly designed towards social aspects. They are also including volunteer programs in their packages, which focus on giving back to communities as part of a more enriching cultural experience.

For instance, travelers took part in a volunteer program with the Cambodian Children's Painting Project (CCPP)<sup>5</sup> and socialized with Cambodian children through an educational workshop on art. With the growing interest of travelers in social welfare and developing local communities, it is expected that the social connectivity tourism trend will gain more mainstream popularity in the future.



Social Connectivity



# Key Trends in Cultural Tourism

## Cultural Gastronomy

Exploring local gastronomy enables travelers to hone their culinary skills and experience different aspects of their destination's every day life. Players in culinary tourism are attracting cultural tourists by offering a wide range of workshops and courses on gastronomy, enabling travelers to enhance their cooking interests and see a different side of a destination and its culture.

It is expected that creativity in gastronomy<sup>6</sup> is likely to grow in the future, due to curiosity among tourists to develop their skills, giving them a distinct link to local cuisines such as 'how to make Fois Gras in France or pasta in Italy', and the rising interest in gastronomic tourism more generally. This is an opportunity for tourism players to engage with food festivals or events and design packages in a way to give both a creative and personalized experience to consumers seeking access to local and authentic cultures through gastronomy.



Cultural Gastronomy

## Cultural heritage Tourism

Cultural heritage tourism<sup>7</sup> is a growing trend among travelers seeking to explore their own, or new, cultures and heritages by visiting historical or culturally-relevant destinations. Based on the heritage sites, traditions, and art forms of a destination<sup>8</sup>, travelers can enjoy the authenticity of the locations, artifacts, and activities that represent the tradition of its people from the past and present, including cultural, historical, and natural resources.

Players in cultural heritage tourism can attract cultural tourists by focusing on developing tourism packages in ways that enhance tourists' experience. For instance, they can create 'stay like a local', gastronomy, and arts packages in order to give a cultural and personalized experience that can also include trekking and seeing historic artifacts. Key to the success of cultural heritage tourism is ensuring that the experiences are truly authentic and tie back to the traveler's own heritage, or the culture they are particularly interested in.



Cultural heritage Tourism

# Key Trends in Cultural Tourism

## Pilgrimages and religious tourism

With pilgrimage tourism undergoing continuous transformations in recent years, pilgrimages or religious tourism<sup>9</sup> is considered a subset of cultural tourism. Globally, pilgrimage or religious tourism is one of the fastest-growing segments. Tourism players in the market are connecting with the arts and cultural communities<sup>10</sup> and offering holiday packages that can provide a religious-cum-cultural itinerary for the travelers. Either through specific pilgrimages such as participating in Hajj in Mecca or through tours that allow a traveler to reconnect with specific aspects of their religion, such as walking the Way of the Cross in Jerusalem.

It is expected that pilgrimages and religious tourism will grow in the future as it benefits from being part of both the group and individual tourism trends; being less prone to economic crisis as it serves a deeper purpose than traditional travel; and can attract travelers of all ages and nationalities. This is an opportunity for tourism players to ensure that the most prominent or compelling religious locations and events are supported by carefully curated packages that give a unique and long-lasting spiritual and cultural experience to their clients.



Pilgrimages or religious tourism

# In action: Industry responses to the rise of Cultural Tourism

## Stay Like a Local



Airbnb, an online marketplace and hospitality service, launched 'Live There' feature<sup>4</sup> on its app for tourists looking to mingle and live with the locals during their travel. Based on recommendations from local people, the app enables travelers to choose local bars, restaurants, and local sports and experience local tastes.

Using the Airbnb app hosted by local providers, travelers can choose their area of interest such as music, sports, and food. Airbnb is capitalizing on this travel segment by partnering with local experts, which allows tourists to explore and enjoy a unique local travel experience.

## Social Connectivity



G Adventures (formerly known as Gap Adventures)<sup>11</sup> is a social enterprise and small-group adventure travel company that brings travelers closer to the society and its culture. G Adventures is capitalizing on the social connectivity trend by providing an opportunity for local communities in select areas to connect with travelers seeking cultural exploration in their destination.

For instance, on World Tourism Day, G Adventure partnered with the Jane Goodall Institute to raise awareness about animal welfare among the travelers seeking wildlife-friendly tourism.

## Cultural Gastronomy



Eatwith<sup>12</sup> is a social dining application that connects travelers with local hosts looking for authentic culinary experiences, and is currently active in Europe. These hosts provide a unique local gastronomic<sup>13</sup> experience to travelers and offer cooking classes on specified days during the trip.

The app is also leveraging this segment of tourists by designing packages in a way to give creative and personalized experiences to consumers seeking authentic gastronomical tourism.

# In action: Industry responses to the rise of Cultural Tourism

## Cultural heritage tourism



Visit Flanders<sup>14</sup> is a website that provides deals on holiday trips to travelers planning to visit the Flanders region. Based on specific requirements and needs, the site enables travelers to choose the most suitable package. The site provides a wide variety of information about cities and towns in and around Flanders; keeping track of a variety of cultural events, exhibitions, music performances, and tours.

To mark the 100<sup>th</sup> anniversary of the First World War, the site is helping curate tour packages and holidays for those interested in exploring Flanders Fields sites and related commemorative events.

## Pilgrimages or religious tourism



Turjuman is an instant translation app that allows non-Arabic speaking Hajj travelers to translate information<sup>15</sup> into their language. Based on QR codes, the two-dimensional barcodes installed on signage boards, and signposts, the app enables non-Arabic speaking travelers to scan and understand signs during Hajj.

Travelers unable to read can also use the voice feature in the app. The app is using Hajj pilgrimages by facilitating communication more effectively and benefiting consumers by providing a safe and personalized experience when touring Saudi Arabia.



Outlook

# The Way Forward

Consumers are expected to be more open to exploring new cultural activities and more likely to experience new local authenticities. Rapid growth in international travel and increasing traveler sophistication is expected to fuel curiosity and the growth in cultural tourism.

Trends such as stay like a local, social connectivity, cultural gastronomy, and historic culture are expected to remain highly influential within cultural tourism.

Destinations must embrace their tangible and intangible resources and incorporate elements in their tourism offerings. In particular, countries with rich cultural traditions should focus on the development of cultural tourism and provide incentives for local businesses to invest in this segment.

It is essential that the authenticity of the destination is not dampened by increased tourism flows; this is a key challenge for locations and the industry.



Tourism boards, hotels, and resorts operating predominantly in rural areas must partner with local hosts to create unique cultural experiences. This will have a positive trickle down effect on both tourism businesses and local hosts.

Tour operators must tap into this tourism trend by building packages around destinations that are globally known for their rich cultural history, such as the Caribbean, Europe, and Asia. To ensure the success of such offerings, operators must combine cultural tourism aspects with other emerging trends such as voluntourism, ecotourism and wellness, transformative, and adventure tourism.

This will create a complete tourism experience, allowing the industry to benefit from word of mouth recommendations.

Hotels willing to target cultural tourists must develop a series of highly authentic cultural activities or partner with external providers offering such services.



Appendix

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# Terminology and definitions

| TERMINOLOGY                             | DEFINITION  |
|---|---|
| <b>Cultural Tourism</b>                 | Cultural tourism is defined as a tourism that offers travelers an opportunity to learn and develop their creative potential, which includes crafts, cookery workshops, and arts, and connect with local communities in a distinct location. |
| <b>Culinary Tourism</b>                 | Culinary tourism refers to trips in which the exploration of local gastronomy plays a central role in the overall traveling experience.   |
| <b>Millennial</b>                       | Millennial is a term referring to a person who was born between 1981 and 1991.  |
| <b>Gastronomy</b>                       | A type of tourism where travelers experience fine eating with emphasis on gourmet foods and the dining experience.  |
| <b>Cultural heritage Tourism</b>        | A type of tourism where travelers seek to experience different cultures and heritages by visiting historical or culturally relevant destinations.   |
| <b>Cultural/Educational travel</b>      | A type of tourism where travelers learn about the culture.  |
| <b>Pilgrimages or religious tourism</b> | A type of tourism where travelers of particular faiths visit locations that are considered holy sites.  |

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We empower clients to decode uncertainties

they face by providing:

- Unique data
- Expert analysis
- Innovative solutions
- One platform

## Our Solutions



GlobalData provides a range of ways that clients can access our data & insights to meet their individual business needs:

- Intelligence Center
- Consulting Services
- Reports

## Our Industry Coverage



Our services cover **six primary industries**:

- Consumer
- Retail
- Technology
- Healthcare
- Financial Services
- Professional Services

## Our Expertise



- Market Insights
  - Competitive Intelligence
  - Consumer Insights
- Innovation & New Product Development
- Strategy & Planning
- Technology Management
- Marketing Communications
- Channel and Sales Management

## Our clients:





## Ask the Analyst

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