The North American Cultural Tourist

Mary Mahon Jones
mmj@mahonjones.com
Presentation Focus Areas

1. The Opportunity – right now – for the Caribbean to attract more North American Cultural Tourists

2. A case study using psychographic market segmentation and applying it to the cultural tourist

3. Applying the values-based approach to a heritage product
1. WHAT’S THE CURRENT OPPORTUNITY?
Cultural Tourists Tend to be Higher-Yield

“...cultural tourists tend to be older, better educated and earn more money than the travelling public as a whole. They generally spend more money on holiday, stay longer in a particular area and participate in more activities than other tourists.”

- Andrea Hausmann *

* “Cultural Tourism: Marketing Challenges and Opportunities for German Cultural Heritage”, International Journal of Heritage Studies, Vol 13, No. 2, March 2007, p 175
Canadians & Americans

Why They Make Great Cultural Tourists

- Culture is important
- Educated, curious, love to learn
- Love to travel
- Aging population

The Current Opportunity

- Value of Canadian and US $$
- Consumer confidence edging up
Canadians are Well-Positioned for Cultural Travel

**Begin with 1 part post-recession mindset**

...**Add 3 parts strong Canadian dollar**

**Result:** More Canadians travelling

Stats Can, “The Daily”, Mar 1, 2010
Canadians Love to Travel

Table: Percentage changes y/y in travel

Sources: Statistics Canada and Caribbean Tourism Org
US and Canada Consumer Confidence

Source: Harris/Decima
US Outbound Travel

Table: Percentage changes y/y in travel

- Europe: -4.0%
- Caribbean: -2.1%
- Asia: -4.0%
- South America: 1.2%
- Oceania: 2.6%
- Middle East: 41.4%
- Africa: 25.2%
- Mexico: -10.5%
- Canada: -8.6%
### The Opportunity for Destinations

<table>
<thead>
<tr>
<th>Diversify</th>
<th>Differentiate</th>
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<tr>
<td>- Product offer</td>
<td>- Every culture is unique</td>
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<td>- Revenue by attracting a high-yield customer</td>
<td>- Ramp up competitive advantage</td>
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MARKETING BASED ON PSYCHOGRAPHIC RESEARCH

North American Cultural Tourists
Psychographics - The 4\textsuperscript{th} Dimension

- **Geography**
  - Where you live

- **Demography**
  - Age, gender, family size and lifecycle, income, occupation, etc.

- **Behaviour**
  - Travel and hospitality choices, loyalty, frequency, etc.

- **Psychographics**
  - Activities
  - Interests
  - Opinions
  - Attitudes
  - Values
Case Study: Canadian Tourism Commission’s Explorer Quotient ™

www.keep-exploring.ca/eq

www.environicsanalytics.ca
Free Spirits – 11% US & 11% Can

Cultural Explorer - 12% US & 12% Can

Authentic Experiencer – 13% US & 13% Can

Source: Canadian Tourism Commission, Explorer Quotient™ www.keep-exploring.ca/eq
Authentic Experiencer

13% of US
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# Culture as a Travel Motivator

<table>
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<tr>
<th>Culture (high motive)</th>
<th>Culture and other motives</th>
<th>Other motives and culture</th>
<th>Non culture – only for rainy days, etc.</th>
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**Cultural Explorers**

**Authentic Experiencers**

**Free Spirits**

Adapted from: Canadian Tourism Commission, Explorer Quotient™ [www.keep-exploring.ca/eq](http://www.keep-exploring.ca/eq)
Authentic Experiencers

Experience nature and cultures for personal growth – no crowds!

- Authenticity is important
- Like beautiful landscapes
- Want to chart their own course
- Learn before and during the trip

Cultural Explorers

Learn about cultures by being there

- Love to travel, often
- Want to experience local lifestyles and cuisine
- Demand sustainability

Free Spirits

Have fun seeing and doing everything with my friends and being the centre of attention

Travel Values & Behaviours

Adapted from: Canadian Tourism Commission, Explorer Quotient™ www.keep-exploring.ca/eq
CASE STUDY: CANADA’S MOUNTAIN PARKS

Lessons from Canada
Case Study: Canada’s Mountain Parks

The Opportunity

- Tourism magnets, icons of Canadian heritage and culture
Canada’s Mountain Parks: the Challenge
Getting the RIGHT visitor to the RIGHT place
Going beyond the road
In Summary...

• A cultural strategy focused on the visitor’s values and current mind set will
  – Effectively differentiate the destination, increasing competiveness
  – help wedge the North American away from the Staycation mentality
  – Attract Canadians with a post recession mindset and higher value Cdn $$
  – Help plan satisfying experiences
  – Set the stage for return visitation
To be continued in Part 2...

• Using examples from around the world,
  – linking the visitor to the right experience by setting and meeting expectations
  – Aligning messaging, imagery and product to travel values
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Mahon Jones & Associates
mmj@mahonjones.com
www.mahonjones.com
1588 Look Out Point
North Vancouver BC
604-833-3290