

# What are the opportunities for cultural tourism from Europe?

Europe is a well-established market for cultural tourism. European holidaymakers are increasingly interested in discovering new destinations, especially if these offer authentic activities that teach them about local culture. This makes cultural tourism a promising sector for developing country destinations. Offer flexible cultural components to appeal to both motivated and incidental cultural tourists. Internet presence is important, as European cultural tourists often book their holidays directly.

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## 1. Product description

Cultural tourism is international travel directed towards experiencing local arts, heritage, landscapes, traditions and lifestyles. It is a broad market with many sub or niche markets. Exploring cultural heritage is the most common form of cultural tourism among European cultural tourists.

Examples of cultural tourism experiences include:

- architectural and archaeological treasures
- culinary activities
- festivals or events
- historic or heritage sites, monuments and landmarks
- museums and exhibitions
- national parks and wildlife sanctuaries
- religious venues, temples and mosques

## Destinations

The attractiveness of a cultural destination varies greatly from person to person. Most European cultural tourists initially focus on famous cultural attractions within Europe. Then they consider travelling to famous sites further away.

### Tip:

Invite European tour operators to visit your destination. Show them the cultural opportunities it has to offer.

## Health and safety measures

Health and safety are important to European cultural tourists. They often inquire about the safety of their

destination. Especially safe driving can be a concern. They want to know the qualifications of their drivers and how/when the equipment is tested. Unclean rooms and a lack of (or faulty) smoke detectors are an annoyance at the destination. This might result in bad reviews after the holiday.

### **Tips:**

Pay attention to general safety measures. For example, tour operators should check vehicles and equipment regularly and hire experienced guides who know the area well. Accommodation establishments should have safety measures in place, such as smoke detectors, fire extinguishers, emergency exits, first-aid kits and 24-hour medical assistance.

Show the outcomes of safety checks and licences to your clients.

## **Political stability**

Safety is important to European tourists, especially because some developing countries are politically unstable. Most commercial tour operators don't offer holidays to countries that their Ministry of Foreign Affairs has declared unsafe. This has previously led to a drop in tourism arrivals in countries such as Mali, Egypt and Kenya.

### **Tips:**

Keep potential customers updated on changes in the safety situation in your area. You can do so through your website and your staff, for example. Be open and honest in your communication: explain which areas are safe or where safety might be an issue. Remember that your customer has plenty of information sources too.

Share safety experiences from customers on your website. Let them write about how safe they felt, because tourists value the experience of other travellers.

If your region is 'unsafe', commercial tour operators will most probably not go there. In this case, focus on volunteer organisations and individual travellers. Check your country's current safety status on the websites of the Ministries of Foreign Affairs in your target countries ([Ireland](#), the [United Kingdom](#) etc.).

## **Value for money**

Cultural holidays are often subject to price changes. To save money, European tourists look for cheap deals and shorter holidays. However, this is not so much the case for cultural holidays to developing countries. Tourists understand that these holidays are more expensive, and are prepared to pay more for a high-quality experience.

### **Tips:**

Emphasise the authentic historical and heritage sites of your destination.

Be transparent in product pricing. Avoid unpleasant surprises for customers, like charging more than the advertised price.

## Sustainability

Tourism providers' eco-friendly activities are increasingly important to European tourists. However, only some actually choose a tourism provider based on its sustainability policy. Cultural tourists value sustainability less than [community-based](#) or [nature tourists](#), for example. However, they do appreciate it when you offer sustainable elements.

### Tips:

Incorporate sustainable and environmentally friendly practices, like water-saving taps and showers, working with local products and/or using solar power.

For more information and best practices, see the [UNESCO World Heritage Sustainable Tourism Toolkit](#). In addition, see our study on [the need for sustainable suppliers](#).

Accommodation providers can encourage their guests to act responsibly, for example by using less water and energy or fewer paper towels. For more information, see wikiHow's [How to Create a Green Hotel](#) and Global Stewards' [tips for green accommodation](#).

## Flexible offerings

European cultural tourists look for flexibility. They increasingly want to compose their own holidays by combining separate components. Tour operators can offer flexible holiday packages with standard and optional components that customers can use to create a unique holiday.

### Tips:

Tour operators should be flexible. Offer different types of activities and accommodation that customers can combine. Most cultural tourists like a small part of the trip to be relaxing.

Beach breaks are popular in combination with a cultural holiday.

## 2. Traveller profile

Based on the level of interest in culture, there are two types of cultural tourists:

### Motivated cultural tourist

Most people in this group have a:

- higher education background
- medium to high income
- considerable interest in culture
- considerable interest in social and environmental issues

Experiencing and learning about local cultures is their main travel purpose. Motivated cultural tourists like to be

prepared before going on holiday. They study the destination thoroughly and like to see and learn as much of it as possible. This group is quite demanding.

### **Tips:**

Focus on offering quality. For example, include high-quality accommodation and restaurants in your cultural packages.

Communicate that you know your destination and its history very well. Invest in good guides and provide a detailed programme of excursions and background information. Look beyond the highlights. These customers tend to know a lot about the destination, as they have prepared their journey very well. It might have been on their 'bucket list' for years!

Offer packages with a wide variety of cultural activities.

Develop itineraries with a special cultural theme.

## **Incidental cultural tourist**

This group likes to add cultural components to their holiday. However, they have another primary reason for their trip. They may participate in cultural activities that fit their plans.

### **Tips:**

Develop general packages that include optional cultural components.

Invest in on-the-spot promotion to reach incidental cultural tourists. For example, spread leaflets in hotels or restaurants.

Cultural tourists can also be segmented by stage of life. Each age segment has different interests:

## **Young and hip: 20-39**

This segment mainly consists of couples and groups of friends. Most tourists in this group prefer sun and beach holidays. However, they increasingly incorporate cultural elements too. Women are generally more interested in cultural elements than men. Men prefer more action-oriented activities. Around a third of this segment are interested in holidays with an emphasis on culture.

### **Tips:**

Develop packages for younger people. Include some cultural highlights in addition to sun and beach activities.

Accommodation providers should offer night-time entertainment with local musicians.

## Middle-aged: 40-54

This is the largest cultural tourist segment. Many members of this group are motivated cultural tourists.

### Tip:

For tips, see 'motivated cultural tourist'.

## Older generation

Europe has a relatively large generation of people between 55 and 70 years old. This generation generally has more time and money available than other groups. The segment is growing due to Europe's ageing population. In many cases their children have moved out and/or they are entering retirement.

Cultural holidays are the most popular holidays among this group. Many of these people are experienced travellers who travel at least once a year. They value their annual long holiday and mostly travel in couples, with a full schedule of cultural activities. They prefer destinations they have wanted to see all their lives ('bucket-list' travel). Quality is important to them. They look for comfort, more so than the other age segments.

### Tips:

Focus on high-quality (though not necessarily luxury) and quiet surroundings. Provide plenty of background information about the cultural activities and local heritage.

Reassure older tourists that your country is safe to travel to. Refer to information from Ministries of Foreign Affairs or embassies.

Older generation tourists like to know what to expect during their holidays. Provide a detailed day-to-day schedule.

Accommodation providers should focus on comfort. For instance, storage for medication, sufficient medical support, comfortable beds and luggage service should be available.

For more information on this segment, see our study on [senior travel](#).

## Families with children: parents 25-50

Many families combine a relaxing holiday with cultural activities. Parents like to introduce their children to other cultures. Both families with young children and families with older children are interesting segments. Health and safety at the destination is important to them. Convenience is a deciding factor.

### Tips:

Compose packages/activities that are also attractive to children.

Offer appropriate accommodation. For example, families with children prefer spacious and/or adjoining rooms and accommodation with a swimming pool.

### 3. Which European markets offer opportunities for cultural tourism?

The World Tourism Organisation UNWTO estimates that [cultural tourism accounts for about 40% of global tourism](#). For statistics on European source markets and destination countries, see our study on [European demand for tourism in developing countries](#).

### 4. What trends offer opportunities on the European market for cultural tourism?

#### Interaction with locals

European cultural tourists like to interact with locals. They are interested in locals' ideas and opinions about everyday topics. Cultural tourists don't want to just passively experience culture. This means rather than being shown, they prefer open communication about locals' daily lives. This trend towards interaction with the locals is expected to continue over the next five years, at least.

#### Tips:

Offer opportunities for interaction with locals. Emphasise these opportunities in your marketing activities.

Depending on their respective languages, European tourists may need an interpreter to communicate with locals. [Day Translations](#) discusses the role of interpreters in tourism, as well as some tips for successful interpreting.

#### Authenticity

In recent years, authenticity has become a major factor in tourism. This is not expected to change any time soon. Cultural tourists apply relatively high standards for authenticity. They like aspects of culture that are supported by the local population. There is demand for both authentic and more 'packaged' cultural experiences.

Here, authentic means that individual tourists visit/arrange cultural activities themselves. For example, excursions to sites that tourists don't visit much. It can also mean individual visits to popular cultural activities.

'Packaged' cultural experiences are generally conducted by tour groups. Here, the cultural experience is part of the travel package.

#### Tips:

Focus on the authenticity of your destination. Explain that tourists can experience the daily lives of local people.

Accommodation providers could consider giving their accommodation the look and feel of the local surroundings.

Give examples of authentic experiences that contrast with your visitors' daily lives. Explain that there will be room to interact and participate. For instance, learning how to cook a local dish with a local family, attending a cultural festival or a religious ceremony.

## Historical and heritage sites

Cultural tours focusing on historical and heritage sites dominate the cultural tourism market.

Other popular culture-related activities:

- sightseeing tours
- visiting religious venues
- visiting museums and exhibitions
- visiting castles and palaces

These activities are expected to remain popular in the future.

### Tip:

Make an inventory of all interesting historical and heritage sites your destination has to offer. Also make a list of activities in your area. Present these lists to European tour operators and on your website.

## Growing market for study tours

Study tourism is a growing niche market that is expected to increase further in the coming years. Gaining cultural knowledge is the main purpose of a study trip. These tours provide in-depth knowledge of the destination and are generally lead by scholars, like archaeology teachers.

### Tip:

Make sure you know your destination and its cultural heritage thoroughly and invest in excellent guides. Study tour tourists have good background knowledge of your destination.

## Increasing use of online research

European cultural tourists increasingly research and plan their trip online. This applies in particular to motivated and inspired cultural tourists. To gather information and share experiences they use:

- peer review sites, like [TripAdvisor](#) and [Zoover](#)
- travel forums, like Lonely Planet's [Thorn Tree forum](#)
- social media, like [Instagram](#), [Facebook](#), [Twitter](#) and [YouTube](#)

Personal recommendations from family and friends are also important. Online research is a trend that has increased exponentially over the past years. Although growth has peaked, the use of the Internet to research tourism will continue to increase. It is predicted to remain the most important research channel for years to come.

## Tips:

Maintain a strong Internet presence and online marketing strategy, including social media.

Use photos and videos to bring your story alive. For more information, watch this [webinar series on visual communication in adventure travel](#) by the Adventure Travel Trade Association (ATTA) and Libris.

Use current customers as ambassadors for your company and area. Encourage them to share their experiences and visuals on social media, to write blogs and to review your company.

For more information, see our [10 tips for online success with your tourism company](#).

For more information, see our study on [European tourism market trends](#).

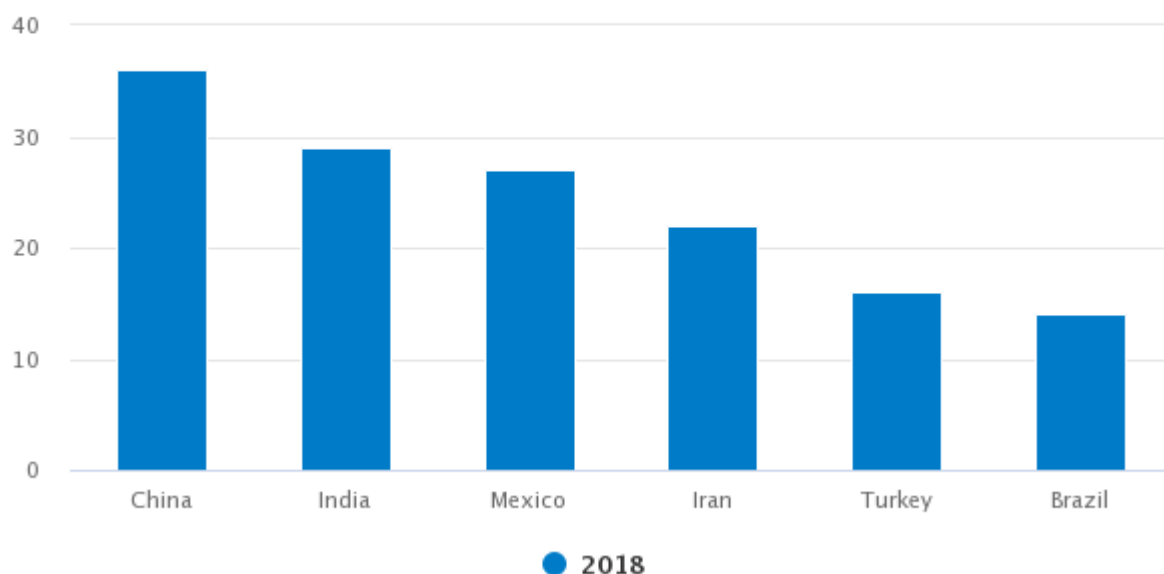
## 5. What requirements should your cultural tourism product comply with to be allowed on the European market?

For information on requirements, see our study on [what requirements your services should comply with to attract European tourists](#).

## 6. What competition do you face on the European market?

### UNESCO Cultural World Heritage Sites

Figure 1: Developing countries with the highest number of UNESCO World Heritage Cultural Sites 2018



Source: UNESCO

[Cultural World Heritage Sites](#) can give cultural tourism destinations a great competitive advantage. UNESCO now has a [World Heritage and Sustainable Tourism Programme](#) to help countries protect their heritage while developing tourism.



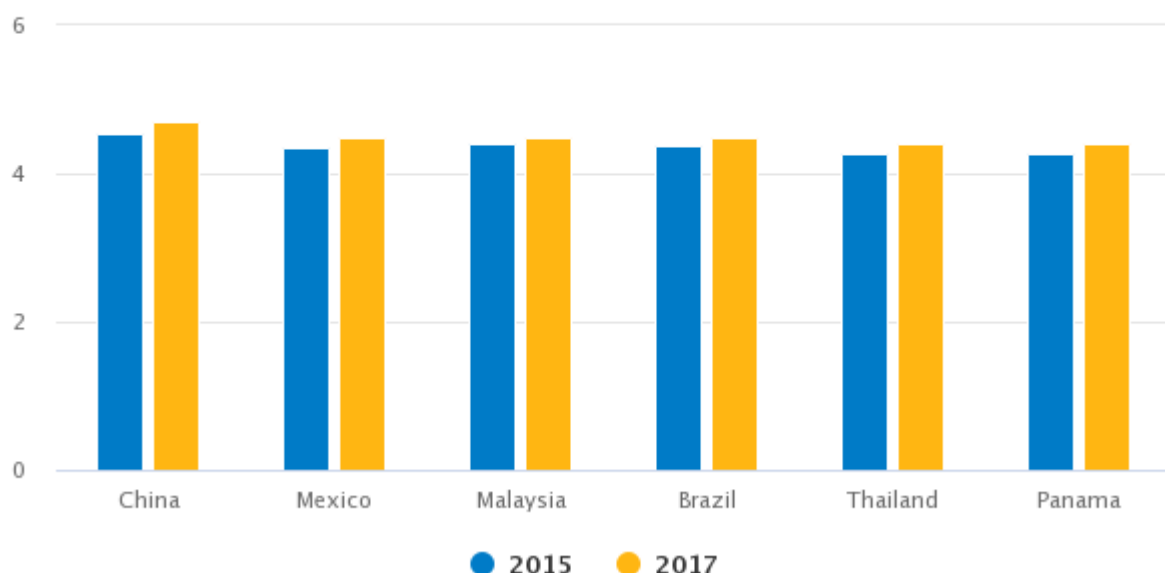
## Tips:

If your product is related to a UNESCO Cultural World Heritage Site, promote this clearly. Emphasise that this site is unique to your destination.

For more information and best practices, see the [UNESCO World Heritage Sustainable Tourism Toolkit](#).

## Travel and Tourism Competitiveness Index

Figure 2: Developing countries with the highest Travel and Tourism Competitiveness Index score 2015–2017



Source: Travel and Tourism Competitiveness Index

The number of UNESCO Cultural World Heritage Sites is included in the [Travel and Tourism Competitiveness Index](#) (TTCI). The TTCI provides insight into the competitiveness of your country as a market for tourism. It is based on:

- Enabling Environment
- Travel & Tourism Policy and Enabling Conditions
- Infrastructure
- Natural and Cultural Resources

The TTCI tells tour operators which countries/regions are attractive as new tourist destinations. Pillar 14 'Cultural Resources and Business Travel' is a good indicator of a destination's cultural attractiveness. It provides insight into your cultural competitiveness.

Many developing country destinations improved their scores between 2015 and 2017. In fact, most of the countries with the highest increase in scores are developing countries such as Azerbaijan, Tajikistan, Vietnam and Algeria.

### **Tips:**

Identify and focus on your country's key competitive advantages over other countries. Differentiate tourists' unique experience in your country.

Use the TCCI to compare your country's performance to that of others. In which areas does it score well? Emphasise this in your marketing message.

Go to the World Economic Forum's [Travel and Tourism Competitiveness Report](#) for more detailed information per country.

## **7. Through what channels can you get your cultural tourism products on the European market?**

### **Selecting smaller specialised tour operators**

Smaller European tour operators specialised in cultural tourism or your destination offer the best opportunities. You can identify them via trade associations, events and databases.

Some examples:

- [ECTAA](#) - national associations of travel agents and tour operators per European country.
- [ITB](#) - annual tourist trade event, March, Berlin.
- [Top Resa](#) - annual tourist trade event, September, Paris.
- [World Travel Market](#) - annual tourist trade event, November, London.

### **Generating direct sales**

European cultural tourists increasingly book their holidays directly with service providers at the destination. To increase your chances of direct sales, you can promote your product on (cultural) tourism websites/portals.

For instance:

- [GoNOMAD](#)
- [The Culture Trip](#)
- [Wanderlust](#)

## **8. What are the end market prices for cultural tourism products?**

Tourists have many destinations and types of holiday to choose from. This makes tourism a relatively price-sensitive and competitive industry. The price of a long-haul trip is determined by three factors:

1. The exchange rate between the currency of the country of origin and that of the destination country.
2. The costs of transport to and from the destination country.
3. The price of goods and services the tourist consumes in the destination country.

European tour operators are not open about the purchasing prices of their tourism products. According to industry experts, their margins vary between 10% and 25%. Prices of holiday packages vary widely as they depend on a lot of factors, such as:

- availability
- destination
- modes of transport
- travel period

- number of travellers
- length of stay
- type of accommodation
- activities included

### Tips:


Check which countries have cheap direct flights to your destination, for instance at [Skyscanner](#). This gives you a competitive advantage in those countries.

You can compare prices for cultural tourism products via portals like [Lonely Planet History & Culture](#).


Tourism Council WA has some useful [online tools for pricing tours and accommodation](#). These help you determine the break-even point and ideal retail price of your tourism product.

Please review our [market information disclaimer](#).

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