

Travel to Historic Attractions
In South Carolina and the United States
Market Trends

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Overview

Travel industry experts define cultural heritage tourism as traveling to experience the places, artifacts and activities that authentically represent the stories and people of the past. It includes cultural, historic and natural resources.

Travel to heritage attractions has been a popular segment of the tourism industry in the last decade. Between two studies conducted in 1996 and 2003 by the Travel Industry Association of America (TIAA), there was a 13 percent increase in heritage travel. In 2003 TIAA reports that 81 percent of American adult travelers included heritage or culture on a trip, which translates into approximately 118.1 million adult travelers per year. Visiting a historic site (building, battlefield or historic community) is the most popular heritage activity, followed by museums and heritage festivals. Heritage travelers typically stay longer, spend more money and use more commercial accommodations than other travelers. In fact, compared to other travelers, a higher percentage spends \$1,000 or more on a trip.

They are also likely to shop more, especially for unique items representative of the destination. They are older, wealthier and better educated than other travelers, and they are more likely to extend their trip, with over one-fourth adding two or more extra nights. Baby Boomer households (age 35-54) take four in ten historic/cultural trips. Nearly one-third of heritage travel parties report that their destination choice is influenced by a specific historic activity, sometimes related to a hobby or other personal interest. The majority of historic travelers are last-minute planners--planning their trips in 30 days or less of the departure date.

In 2003 the top ten cities visited by historic/cultural travelers according to TIAA, were Washington DC, New York City, Chicago, Boston, Las Vegas, Norfolk, Atlanta, Orlando, San Francisco and Los Angeles.

TIAA has identified a number of factors that presently affect heritage tourism:

- *the popularity of weekend travel, packages and local itineraries
- *ready availability of information on the Internet
- *aging of the Baby Boomer population
- *post-9/11 interest in understanding America's heritage and exploring distinct communities
- *economic slowdown limiting travel to regional automobile trips

Many issues confront heritage tourism operators--chiefly sustainability, capacity, resident concerns, and competition from commercial ventures. However, heritage tourism has tremendous potential for promoting preservation of a community's unique character while diversifying the economy and appealing to travelers.

After working with local heritage programs across America for the past decade, the National Trust for Historic Preservation has identified five basic principles for creating a sustainable heritage program:

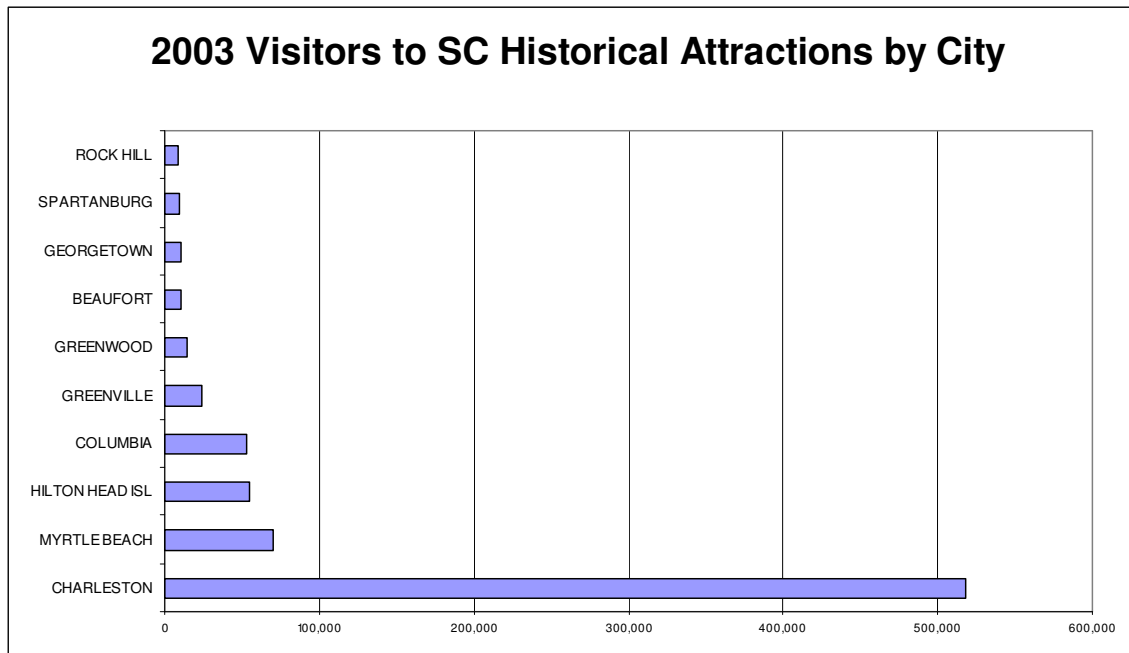
- *collaborate
- *find the fit between a community or region and tourism
- *make sites and programs come alive
- *focus on authenticity and quality of experience
- *preserve and protect resources

Compared to U.S. heritage travelers in general, visitors to South Carolina historical attractions are older, travel in smaller parties, include fewer children, stay in condos more and homes less, travel more frequently by car, shop more frequently, and spend somewhat less on their trips.

South Carolina: Destinations of Historic Attraction Visitors

According to the *TravelScope* statistical gathering service, there were 1.6 million visitors to historic attractions in South Carolina in 2003. This market share represents less than 2 percent of the total 83.5 million historic attraction visitors in the United States (*see more on U.S. market page 8*).

Charleston's metropolitan area receives a whopping 64 percent of the historic attraction visitors to South Carolina. Columbia, Hilton Head Island and Myrtle Beach receive 6.5 to 8.7 percent each.



South Carolina: Origins of Historic Attraction Visitors

Forty-five percent of the historic attraction visitors to South Carolina are either South Carolina residents or residents of the neighboring states of North Carolina and Georgia. Florida and Ohio each contribute slightly over 7 percent of the current visitors. Maryland and New Jersey contribute smaller market shares of 4.6 percent and 3.5 percent respectively. Illinois, Connecticut and Massachusetts each contribute about 2 percent.

Origin by State

STATE OF ORIGIN	NC	SC	GA	FL	OH	MD	NJ	IL	CO	MA	OTHER
Percent of Trips	17.5	15.0	12.2	7.3	7.2	4.6	3.5	2.3	2.3	2.2	25.9
Rank	1	2	3	4	5	6	7	8	9	10	

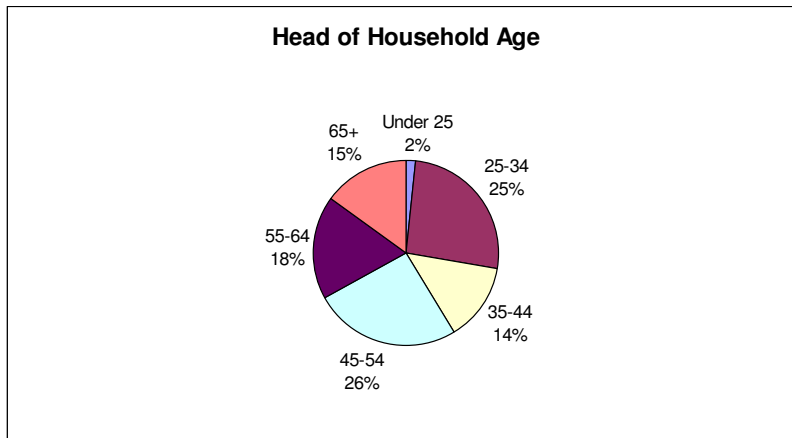
A closer look reveals the Designated Market Areas (or DMAs) that provide the most historic attraction visitors to South Carolina, and therefore comprise model markets for historic attraction advertising and other marketing. These include such major out-of-state metropolitan areas as Charlotte, Atlanta, Greenville-Asheville, Cleveland, Tampa and New York City.

Origin by Market

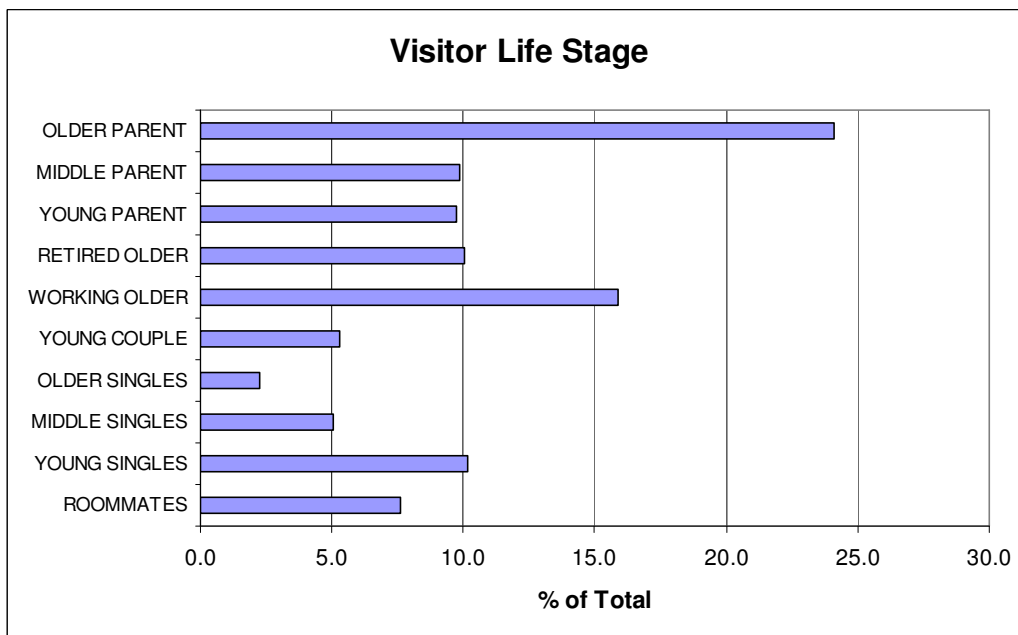
DMA OF ORIGIN	%	#
CHARLOTTE, NC	11.4	1
ATLANTA, GA	10.3	2
GREENVILLE-SPARTANBURG-ANDERSON-ASHEVILLE, SC/NC	5.7	3
COLUMBIA, SC	5.6	4
CLEVELAND, OH	3.9	5
TAMPA-ST PETERSBURG-SARASOTA, FL	3.3	6
NEW YORK, NY	3.3	7
CHARLESTON, SC	2.9	8
BALTIMORE, MD	2.8	9
WASHINGTON DC	2.7	10

South Carolina: Age and Other Characteristics of Historic Attraction Visitors

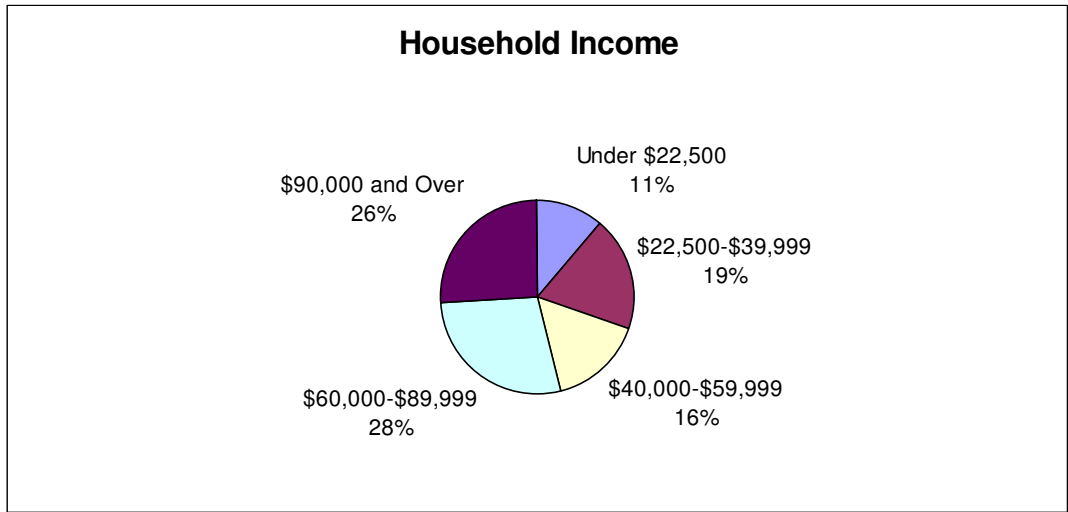
Two age groups account for over half of South Carolina's historic attraction visitors. Based on the age of the head of household in the travel party, 25 percent of the visitors are in the 24-34 age range, and 26 percent are in the 45-54 age range. The next most prevalent ages are 55-64 (18%), 65+ (15%), and 35-44 (14%). These numbers indicate the appeal of historic attraction travel over all age ranges, except the “under 25” segment. The mean average age of the head of household in the travel parties is 48.



In terms of life stage, the most frequent historic attraction visitors to South Carolina are older parents (24%) or working older persons (16%). Young singles, retired older persons, middle parents and young parents each account for roughly 10 percent.



Fifty-four percent of South Carolina’s historic attraction visitors have household incomes above \$60,000, indicating the appeal of this niche to higher income travelers. However, one in five of the historic attraction visitors reports income of \$22,500-\$39,999.



The households of historic attraction visitors to South Carolina are clustered in metropolitan suburbs, second-tier cities, and small towns. In these areas, historic attraction-oriented visitors tend to be people of high education and affluence.

Type of Neighborhood	Education & Affluence			% of Total
	High	Middle	Low	
Metro Urban	0.9	4.4	0.5	5.8
Metro Suburb	17.7	9.4	2.2	29.3
Second City	10.9	4.9	7.9	23.8
Small Town	12.0	8.2	5.9	26.1
Rural	5.1	1.9	8.1	15.1
% of Total	46.6	28.8	24.6	1.0

Eighty-four percent of the historic attraction visitors to South Carolina are white, 8% are African-American and 4.5% are Asian heritage.

Among South Carolina residents, the latest South Carolina Recreation Participation and Preference Study (1999) conducted for the S.C. Department of Parks, Recreation and Tourism shows that visiting historical sites ranked 9th among 46 recreation activities for residents age 12 and older. Visiting a museum ranked 11th. Among adults age 18 and above, visiting historical sites ranks 6th, as an activity of 51.4% of adult South Carolinians, which represents a slight decrease from 53.9% reported in 1990.

South Carolinians age 12 and above report visiting on average 3 historical sites a year and 1 museum per year, both representing increases over previous years. When broken down by age segments, the study shows 54.9% of people age 12-17 visit historical sites (often school field trips), 49.5% of ages 18-29, 53.4% of ages 30-45, 56.7% of ages 46-64, and 39.9% of ages 65 and older. Visiting museums follows a similar pattern: 46.5% participation in ages 12-17, 40.8% in ages 18-29, 42.4% in ages 30-45, 39.9% in ages 46-64, and 33.1% in ages 65+.

Women in South Carolina visit historical sites (54.9% versus 47.5%) and museums (44.9% versus 35.1%) more than men. White South Carolinians visit historical sites (54.9% versus 43.5%) and museums (41.7% and 37.2%) more than black South Carolinians.

Visits to historical attractions rises with income:

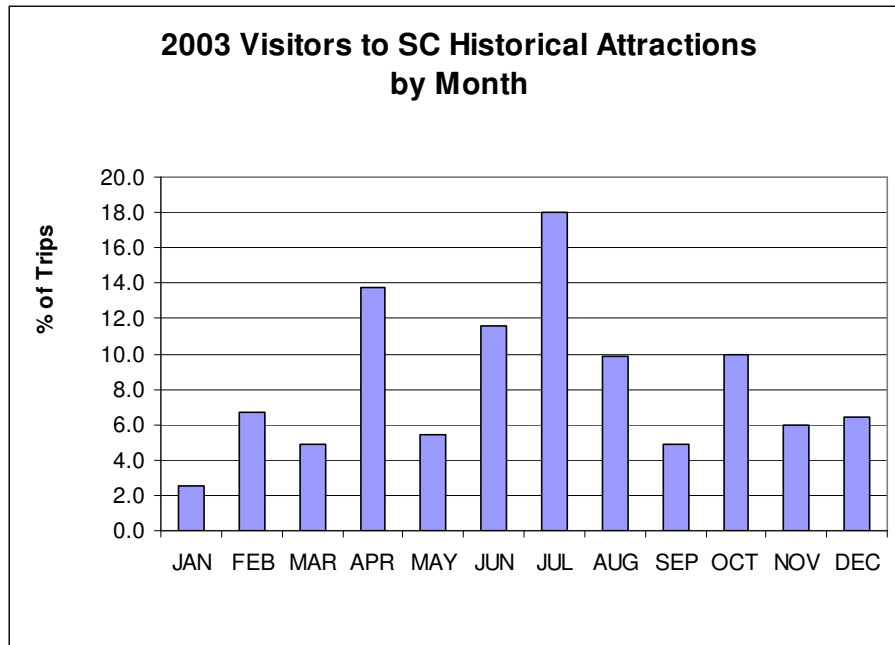
Income level:	Under \$20,000	\$20,000-34,999	\$35,000-49,999	\$50,000-74,999	\$75,000+
Visiting historical sites	42.4%	44.2%	55.4%	69.1%	68.6%
Visiting a museum	32.7%	28.4%	47.6%	48.3%	56.6%

South Carolina: Trip Characteristics Of Historic Attraction Visitors

Historic attraction visitors to South Carolina stay a mean average of 4.6 days. Only 18 percent are day trips, returning home without an overnight stay. The mean average size of their household travel party is 1.9. Forty-nine percent of the parties consist of two adults, and 44% of one adult. Eighty-five percent of the parties include no children.

The average mean expenditure is \$304 per visitor per trip, or \$62 per visitor per day. The expenditure per party is \$565. Total expenditures by historic attraction visitors to South Carolina were \$438,826,768 in 2003.

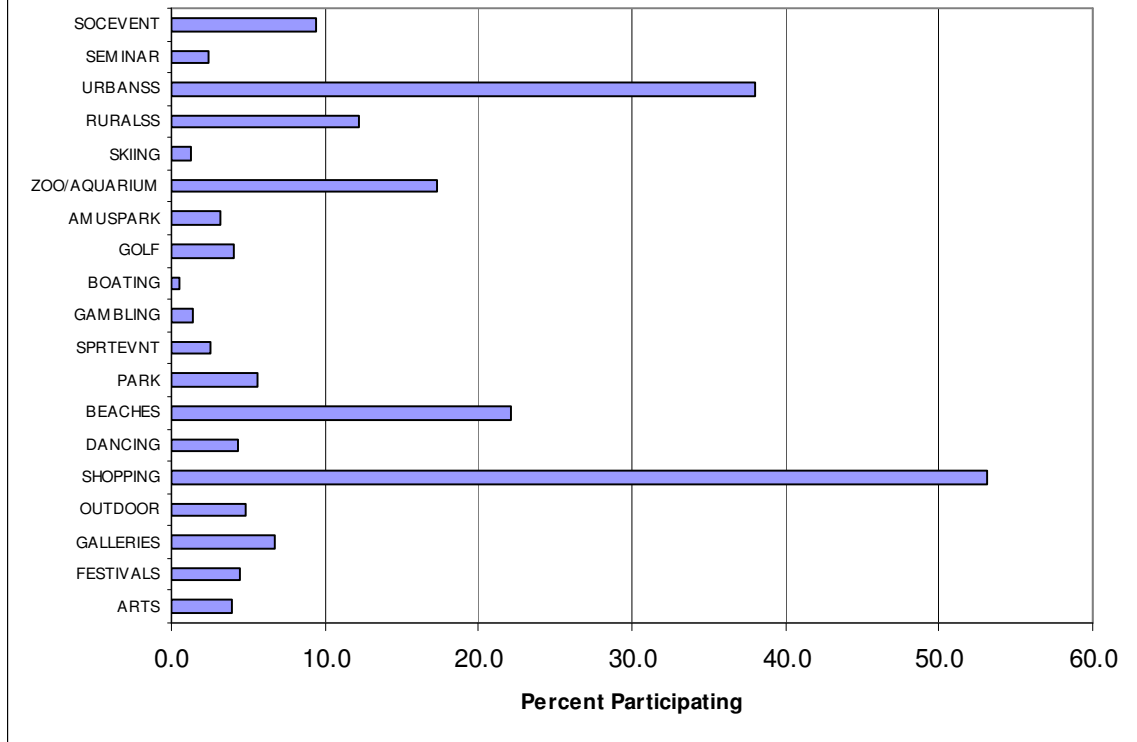
July leads all months in terms of visitation to historic attractions, followed by April, June, August and October. January, March and September are the least frequent months of visitation.



Seventy-five percent of South Carolina's historic attraction visitors travel by car to the state. However, 17 percent of the rest travel by air to the state—a significant travel market.

Their accommodations in the state include hotels (48%), condos (18%) and homes of friends and relatives (14%).

2003 Other Activities of Visitors to Historical Attractions in SC



Besides visiting historic attractions, these travelers to South Carolina also enjoy shopping (frequented by 53%), urban sightseeing (38%), the beaches (22%), and visiting zoos or aquariums (17%).

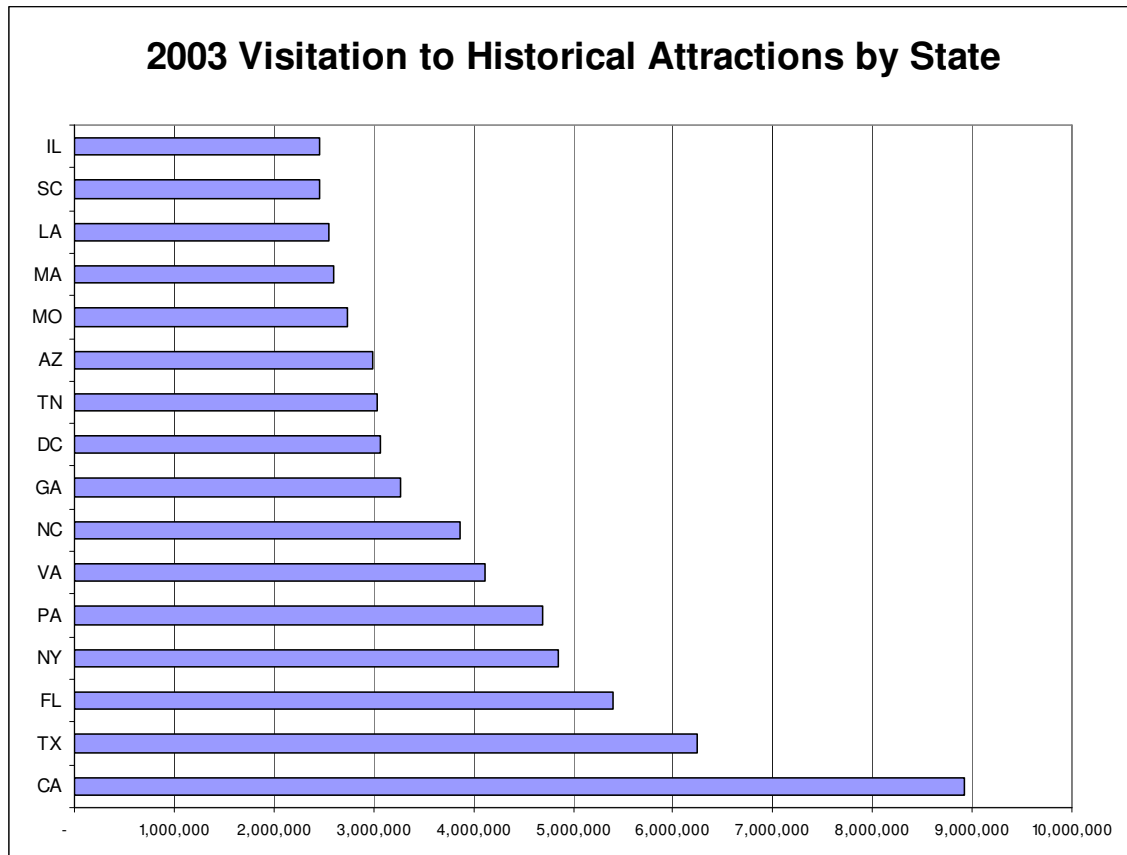
United States: Destinations of Historic Attraction Visitors

According to the *TravelScope* statistical gathering service, there were 83.5 million visitors to historic attractions in the United States in 2003.

California was the most popular destination for historic attraction visitors, attracting nearly 9 million. Nine Southern states are among the Top 16 most popular state destinations for historic attraction travelers, including (in order of visitation) Texas, Florida, Virginia, North Carolina, Georgia, Tennessee, Missouri, Louisiana, and South Carolina. Collectively, the South attracts 41.4 percent of historic attraction visitors, followed by the West (26.6%), Midwest (16.4%) and Northeast (15.6%).

Interestingly, despite its historic past and numerous notable historic attractions, South Carolina ranks behind all its Southern neighbors in attracting historic visitors. It ranks fifteenth among U.S. states in general.

In addition to California, other popular states outside the South for historic attraction visitors include New York, Pennsylvania, District of Columbia, Arizona and Illinois.



These visitation numbers include historic attraction visitors whose final destinations were in the given states as well as those who passed through on their way to other destinations, for instance making the South Carolina figure higher than in the separate South Carolina study.

United States: Origins of Historic Attraction Visitors

More residents of California and Texas visit historic attractions than do residents of other states. However, among the states most accessible to South Carolina, there are large numbers of historic attraction visitors from New York, Florida, Pennsylvania, New Jersey, Ohio, Georgia, Virginia, North Carolina, Maryland and South Carolina.

Origin by State

STATE OF ORIGIN	CA	TX	NY	FL	PA	IL	NJ	OH	MI	GA	VA	WA	MO	NC	MD	SC
Percent of Trips	12.1	9.0	6.4	5.3	3.8	3.6	3.5	3.3	3.2	3.2	2.9	2.4	2.4	2.4	2.2	2.2
Rank	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16

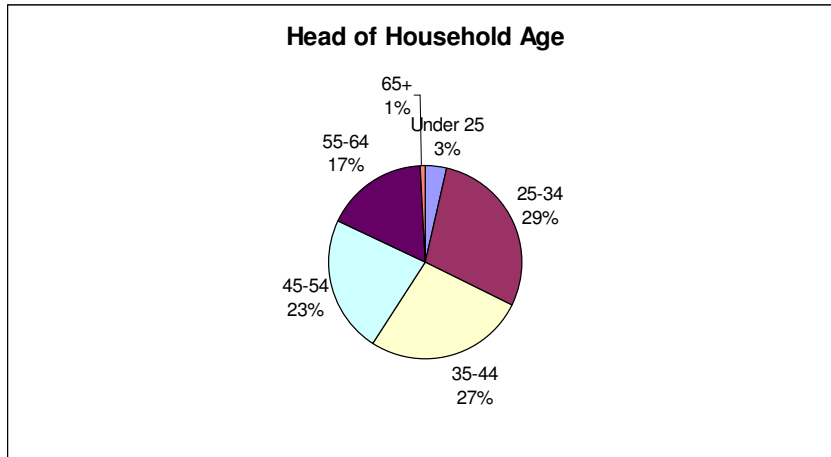
Among the Designated Market Areas (or DMAs) in South Carolina's primary origin markets, there are large numbers of historic attraction visitors living in New York City, Washington DC, Chicago, Atlanta, Boston, Philadelphia, Baltimore, Tampa, Miami and Orlando.

Origin by Market

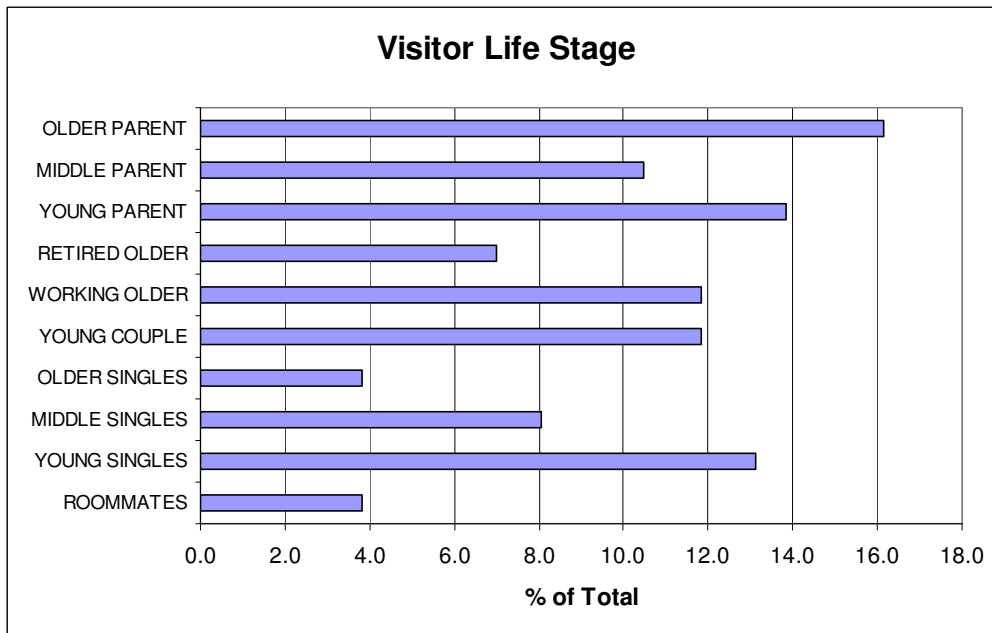
DMA OF ORIGIN	%	#
NEW YORK	7.1	1
LOS ANGELES	5.6	2
SAN FRANCISCO-OAKLAND	3.0	3
WASHINGTON DC	3.0	4
CHICAGO	2.1	5
DALLAS-FT WORTH	2.1	6
HOUSTON	2.1	7
ATLANTA	2.1	8
BOSTON	2.0	9
PHILADELPHIA	2.1	10
SEATTLE-TACOMA	2.0	11
MINNEAPOLIS-ST PAUL	1.8	12
SAN DIEGO	1.6	13
BALTIMORE	1.5	14
DENVER	1.4	15
TAMPA-ST PETERSBURG	1.4	16
SACRAMENTO-STOCKTON-MODESTO	1.4	17
DETROIT	1.3	18
PHOENIX	1.3	19
WACO-TEMPLE-BRYAN	1.2	20
KANSAS	1.2	21
ST LOUIS	1.2	22
MIAMI-FT LAUDERDALE	1.2	23
ORLANDO-DAYTONA	1.2	24

United States: Age and Other Characteristics of Historic Attraction Visitors

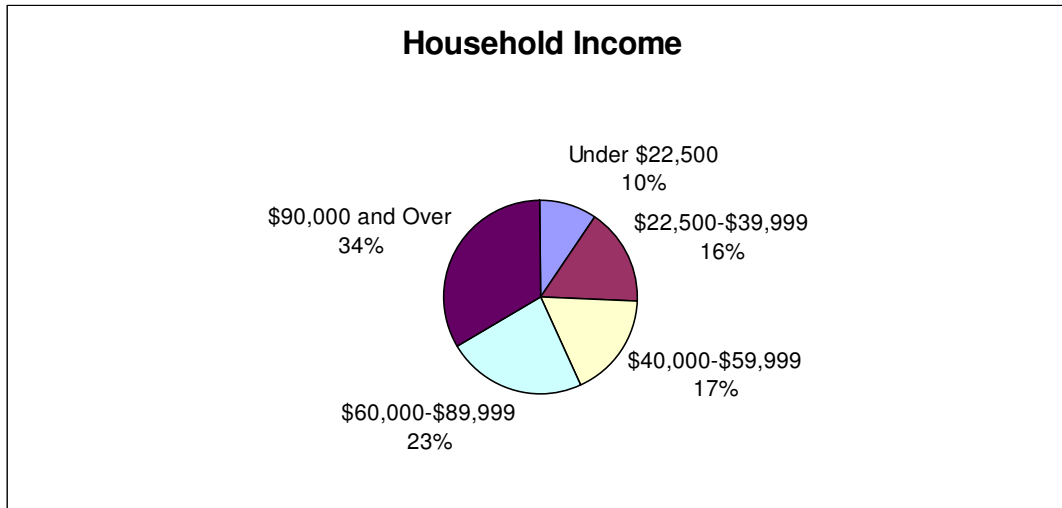
At the U.S. level, interest in historic attractions is fairly well dispersed over several age groups. Based on the age of the head of household in the travel party, 25.3 percent of the visitors are in the 24-34 age range, 23.8 percent in the 35-44 range, 20.2 percent in the 45-54 age range, and 15.2 percent in the 55-64 range. There is less appeal among the "under 25" and "over 65" segments. The mean average age of the head of household in the travel parties is 46.



In terms of life stage, the most frequent historic attraction visitors in the United States are older parents (16.1%), young parents (13.8%) and young singles (13.1%). Young couples and working couples each account for nearly 12 percent.



Fifty-seven percent of the U.S.'s historic attraction visitors have household incomes above \$60,000, indicating the appeal of this niche to higher income travelers. However, one in three of the U.S. historic attraction visitors reports income of \$22,500-\$39,999.



The households of U.S. historic attraction visitors are clustered in metropolitan suburbs, second-tier cities, and small towns. In these areas, historic attraction-oriented visitors tend to be people of high education and affluence.

Type of Neighborhood	Education & Affluence			% of Total
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Metro Suburb	15.6	8.6	5.2	29.4
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Small Town	10.2	7.0	4.7	21.8
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% of Total	47.2	31.8	23.6	1.0

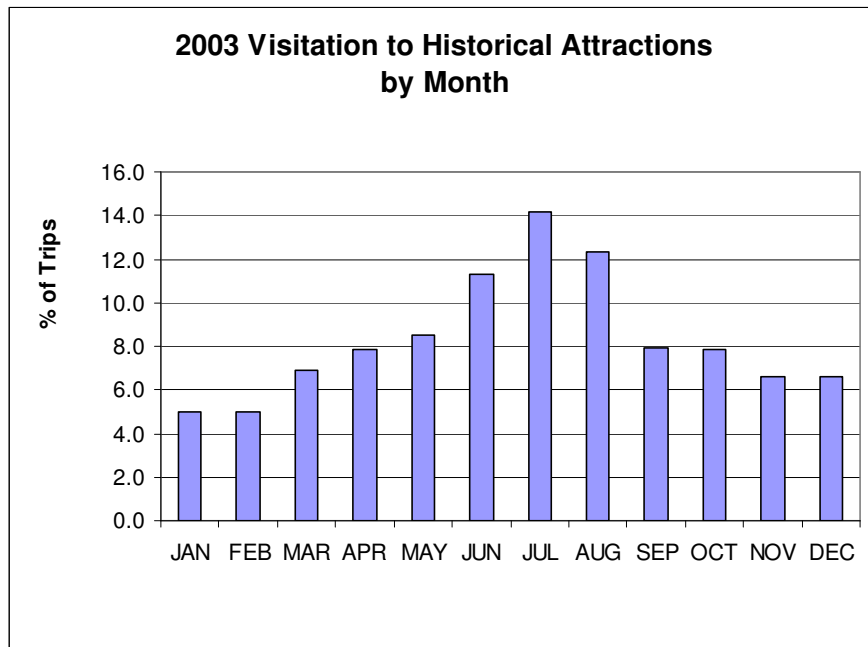
Eighty-eight percent of the historic attraction visitors to U.S. destinations are white, 3.6% are African-American and 2.1% are Asian heritage.

United States: Trip Characteristics of Historic Attraction Visitors

Historic attraction visitors to U.S. destinations stay a mean average of 4.9 days. Only 14.2 percent are day trips, returning home without an overnight stay. The mean average size of their household travel party is 2.3. Over 52 percent of the parties consist of two adults, and 40% of one adult. Over 70 percent of the parties include no children.

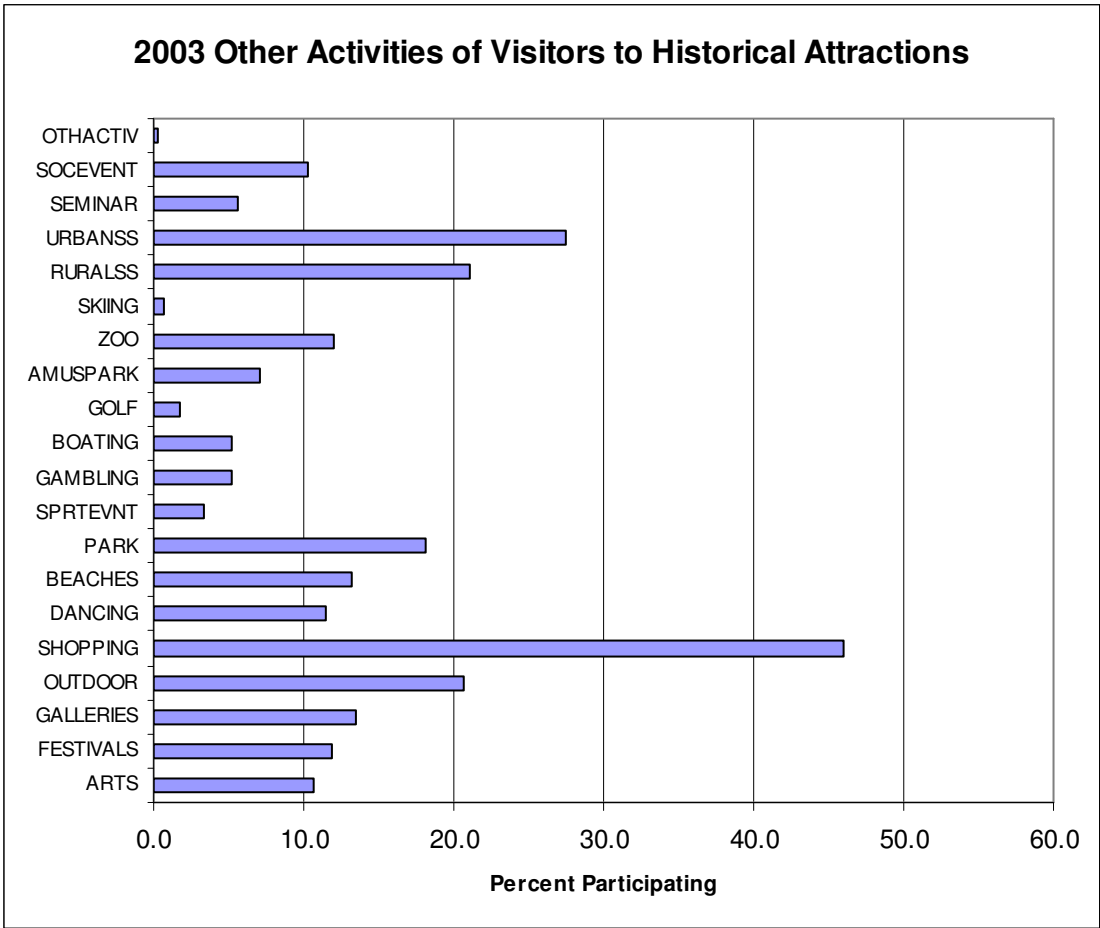
The average mean expenditure is \$341 per visitor per trip, or \$70 per visitor per day. The expenditure per party is \$716. Total expenditures by historic attraction visitors to U.S. destinations were \$28 billion in 2003.

July leads all months in terms of visitation to historic attractions, followed by August and June. January and February are the least frequent months of visitation.



Over fifty percent of the historic attraction visitors to U.S. destinations travel by car to the sites. However, almost 33 percent travel by air.

Their accommodations at their destinations include hotels (56.5%), homes of friends and relatives (22.3) and condos (5.5%).



Besides visiting historic attractions, these travelers to U.S. destinations also enjoy shopping (frequented by 46%), urban sightseeing (27.5%), rural sightseeing (21%), and outdoor activities (20.6%).

Sources

Profiles of SC and U.S. heritage attraction visitors are compiled by the South Carolina Department of Parks, Recreation and Tourism's Marketing Office from *TravelScope*, a national travel survey coordinated by the U.S. Travel Data Center. *TravelScope* is based on a monthly sample of thousands of U.S. households selected from a consumer mail panel. Respondents record details of up to three trips of 50 miles or more one-way or overnight in the previous month. Responses are sample-balanced to match the U.S. population in terms of census region, market size, age of head of household, income and household size. Sample results are projected to represent the total population of U.S. households. There is a margin of error associated with the reported statistics due to sampling variability.

South Carolina Department of Parks, Recreation and Tourism, "South Carolina recreation participation and preference study 1999. Columbia: SCPRT, 1999.

Travel Industry Association of America, "The Historic/cultural travelers, 2003 edition." Washington, DC: TIAA, 2003.

Additional Useful Resources

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