

SEGMENTING AND PROFILING THE CULTURAL TOURISM MARKET FOR AN ISLAND DESTINATION

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ABSTRACT

Culture is an important part of the tourism “product” and is one of the variables that can increase the attractiveness and the competitiveness of a tourism destination. Cultural tourism covers all aspects of travel and provides an opportunity for visitors to learn about a destination’s history and way of life. However, the size and importance of cultural tourism for specific destinations is still a matter of some debate. Some suggest that it is difficult to truly document the size of the cultural tourism market due to the issues of defining a “cultural tourist.” This paper examines the magnitude and significance of cultural tourism for Prince Edward Island, a major Canadian tourist destination. In doing so, the paper segments and profiles the tourism market, and identifies distinguishing trip characteristics. Based on the research, two segments of travellers, based on cultural related activities, are clearly evident. The results indicate that “culture-seeking tourists” and “other interest tourists” are significantly different in terms of many travel variables, and particularly in spending patterns. For the destination studied, the extra economic impact associated with cultural visitors is substantial due to three factors: a closer personal connection to the destination, a longer overall length of stay, and higher per person per night spending.

JEL: L83, M31, Q21

KEYWORDS: Cultural Tourism, Cluster Analysis, Travel Activities, Economic Impact, Cultural Events

INTRODUCTION

Many research studies suggest that a substantial percentage of tourists seek cultural experiences, such as visiting cultural attractions and participating in diverse cultural activities that are *not* “sun, sand and sea” related. The OECD (2009) suggest that 40% of all international tourists are “cultural tourists.” The Travel Industry Association of America has estimated that two-thirds of U.S. adults visit a cultural or heritage site or attraction when they travel (Silberberg, 1995). Based on this data, it has been argued that cultural tourists represent a new type of mass tourist who seek meaningful travel experiences (McKercher and Du Cros, 2003).

There is little doubt that culture is an important part of the tourism “product” and is one of the factors that can improve the competitiveness of tourism destinations. An examination of the forces shaping the cultural “product” helps identify the reasons why cultural tourism is critical at destinations. For this study, cultural tourism covers all aspects of travel where visitors can learn about another area’s history and way of life. Thus, cultural factors in the context of tourism include the entertainment, food, drink, hospitality, architecture, and manufactured and hand-crafted products of a destination, and all other characteristics of a destination’s way of life (McIntosh and Goeldner, 1990). Culture also includes family patterns, folklore, social customs, museums, monuments, historical structures, landmarks, wilderness areas, landscapes, historic buildings, and artifacts. Tourists travel to be informed and to experience folklore, customs, natural landscapes, and historical landmarks as well as being involved in other activities such as nature, adventure, sports, festivals, crafts and sightseeing (Kerstetter et al., 1998). They share a community’s pride in “sense of place” (MacDonald and Jolliffe, 2002). In addition, many activities at destinations that are not educational or cultural in a narrow sense provide opportunities for tourists to get to know each other (Richards, 1996). However, the magnitude and importance of cultural tourism and cultural tourists

for specific destinations is still a matter of debate. McKercher and Chan (2005) suggest that it is difficult to truly document the size of the cultural tourism market due to issues in previous literature.

Who are the tourists that visit cultural attractions or engage in cultural activities? What specific travel behaviours make them distinct from other travellers? How large is the demand for cultural tourism and what elements of culture attract tourists? How can cultural tourism be successfully developed and promoted? The answers to these types of questions may be quite different among destinations due to the different elements that create the culture of each destination. This paper's objective is to segment and profile the cultural tourism market for an Island destination. The remainder of this paper is organized as follows. The next section provides the literature review while Section 3 describes the data and discusses the methodology used. Section 4 documents the results while the final section concludes the paper.

LITERATURE REVIEW

The terms “cultural tourism” and “cultural tourists” are widely used, but also misunderstood. In addition, the definition of cultural tourism and cultural tourist remains vague (Aluza, O’Leary, and Morrison, 1998). Academics, practitioners, and policy-makers have been quick to identify cultural tourism as a significant and growing market, but have been hesitant or unable to describe and define the market. This may be due to the issues raised by McKercher and Chan (2005) who suggest that much of special interest tourism, including cultural tourism, is poorly defined in the literature due to confusion between actions and motives. In addition, they suggest that the literature that reports the percentage of special interest visitors to a destination may be overestimated by upwards of 18 times.

Most attempts at defining cultural tourism agree that it consists of the consumption of culture by tourists (Richards, 1996). However, this approach also produces new problems because it includes a wide range of cultural elements. For example, what kinds of cultural experiences should be included within the scope of cultural tourism? Does a three-hour visit to a museum turn an entire two-week holiday into a cultural tourism experience? Are tourists who engage in cultural activities initially motivated to travel because of cultural attractions? Or, do they find out about the cultural product after arriving at a destination and engage in the activity “as a way to fill an afternoon?” This is certainly the view of McKercher and Chan (2005) who contend that a tourist party visiting a museum is not a cultural tourist, unless visiting museums (engaging in cultural activities) was the prime motivator for visiting the destination. However, this may be a rather narrow view of the term, and the concept (ICOMOS, 1997).

It is clear that defining cultural tourism and cultural tourists is complex because it can mean different things to different people (McKercher and Du Cros, 2002b, 2003). For many tourists, travelling to experience different cultures equates to cultural tourism. For these travellers, encountering different cultures is synonymous with a cultural tourism experience. They consume the different sights, sounds, tastes and smells of an unfamiliar culture. On the other hand, academics and tourism marketers define cultural tourism as a discrete product category that is differentiated from other tourism activities or attractions by consumption of a destination's tangible and intangible cultural heritage (Hall and MacArthur, 1998; Leask and Yeoman, 1999; Richards, 1996; Shackley, 1998). MacDonald and Jolliffe (2002) suggest that cultural tourism helps to identify the destinations potential visitors wish to visit for education, entertainment, and enrichment.

A growing body of literature indicates that some people are more highly motivated to participate in cultural tourism than others. McKercher (2002a) suggests that a definition of cultural tourists is based on the answer to two questions: “what are the main reasons for a trip?”; and “what were the level of experiences at the destination?” A number of both conceptual and empirical studies have attempted to implement this process and explore the typology of cultural tourists.

Silberberg (1995) identified four types of cultural tourists, ranging from the greatly motivated to the accidental, while D. K. Shifflet and Associates (1999) identified three types of heritage tourists: “core”, “moderate” and “low”, with each of the segments demonstrating different behaviour and spending patterns. Stebbins (1996) suggests that there are two types of cultural tourists: “general” and “specialized.” The general cultural tourist makes a hobby of visiting different geographic sites. Over time, as general cultural tourists increase their knowledge of different cultures, they may become specialized cultural tourists who focus on one or a small number of geographic sites or cultural entities.

Aluza et al. (1998) contend that the cultural and heritage tourism market consists of five distinct segments with each having different trip characteristics, suggesting that not all cultural and heritage tourists are alike and should be targeted in different ways. McKercher (2002a) also suggests that cultural tourism can be segmented into five markets based on the depth at which the tourists engage in a culture or a cultural attraction, and how central the culture or attraction was to their choice of destination. To some segments, culture or the attraction played a major role in their decision to visit while for other segments culture played either a minor role or no role in their decision-making (McKercher and Du Cros, 2003).

Martin et al. (2004) report that cultural and general visitors are very different in terms of activities, expenditures, information sources used, and lodging preferences. Their study found that cultural heritage visitors were different from other visitors on most measurements, implying that heritage planners and marketers should take these differences into consideration when planning and promoting cultural heritage tourism. Nyaupane and Andereck (2007) suggest that cultural tourists can be divided into two groups: “true” and “spurious” cultural tourists. Empirical results confirm that the two types of cultural tourists were distinct in terms of demographics, importance of attractions, and travel motivations. Figini and Vici (2012), in a study of off-season visitors to a mass tourism destination, report that cultural tourists are a large and valuable segment and that cultural tourism can aid in smoothing the seasonal nature of tourism while diversifying tourism investment. Gnoth and Zins (2013) develop a cultural contact scale in an attempt to provide a more comprehensive set of variables to measure interest and involvement in cultural tourism. Based on travel motives and activities, six cultural segments are highlighted with 45% of respondents being open to “deep cultural experiences.”

Richards and Van der Ark (2013) visualize the relationship between cultural consumers and attractions and report that two dimensions, type of attraction and cultural experience, effectively discriminate different groups of cultural tourists. Cultural consumption is related to previous cultural experiences and age suggesting that visitors develop a cultural tourism “travel career.” This paper examines the magnitude and significance of cultural tourism for a major Canadian tourist destination. In doing so, the paper attempts to segment and profile the cultural tourism market, identify distinguishing trip characteristics of culture-seeking tourists, and document the economic impact of these visitors to the destination.

DATA AND METHODOLOGY

This study used secondary data drawn from the 2004 Tourist Exit Survey conducted on Prince Edward Island (PEI), Canada’s smallest province, and a major tourist destination. The survey was completed during the main tourist season from June 1 to September 30. Exit point intercepts of non-resident visitors were used to collect contact details. A follow-up telephone interview was used to collect the data. The main purposes of the survey are to collect information on key tourism indicators such as visitor origins, demographics, travel motivators, activities, trip planning, mode of travel, type of accommodation, length of stay, and expenditures. In 2004, 3,139 surveys were completed by overnight pleasure tourists and these were used for this study. Among respondents, nearly 61% were male, 58% worked full time, and 29% were retired. In addition, 76.1% were from Canada, 21.2% from the US, while only 2.7% were international visitors. Respondents varied widely in age, education, and annual household income. Of these, 27.3% were in the 50 to 59 years of age group, 23.7% had graduated from university

(undergraduate), and 25.8% had an annual household income of \$50,000 to \$75,000, while 24% had incomes over \$100,000.

The Exit Survey listed 28 activities that respondents could indicate they had participated in while visiting PEI. For this study, nine of these were deemed to be cultural activities: visiting Canada's birthplace attractions, visiting Founders' Hall, visiting historical/cultural attractions, visiting Anne of Green Gables attractions, experiencing Acadian culture, attending a festival or event, attending a cultural performance (live theatre), going to a lobster supper (meal), and enjoying evening entertainment (bar, pub, etc.). These nine cultural activities were used to develop a typology of cultural tourists.

These activities were deemed to be cultural activities for various reasons. The first two are associated with PEI being considered the "birthplace of Canada." In 1864 an important conference was held between the five British colonies that existed in Canada at the time. The purpose of the conference was to discuss a union of the three Maritime Provinces, however, it gradually evolved into a conference to discuss the union of the five colonies to form the country of Canada. In 1867 Canada became a country and the Charlottetown Conference, as it became known, was deemed to be the beginning point of the process. The third item relates to the fact that PEI was one of the first areas settled in North America. As a result there are many other historical and cultural attractions on PEI. Item 4 "Anne attractions" refers to the book *Anne of Green Gables* written by the well-known Island author Lucy Maud Montgomery. The book was published in 1908, and has been translated into 15 different languages, filmed, made into a television series, and is the title of a musical stage production that has been staged since 1965 and has toured around the world. The story imparts an image of PEI that each year draws thousands of visitors. As a result, Anne is a major focus of the tourism industry in PEI.

Item 5 refers to the second founding group on PEI, the French settlers, who in the Maritimes are known as the Acadians. In the summer, PEI hosts many festivals, events, and live theatre that are often associated with the "Island way of life." Lobster suppers have been a staple of the PEI dining experience for over 40 years. These are often held in church halls and run by community groups and are viewed as being part of the cultural experience on PEI. Finally, bars and pubs are a way for tourists to interact with the local population and in many destinations are viewed as being a part of the cultural experience. To profile characteristics of cultural tourists, eight trip-related variables were used: geographical market, types of visitation, travel information sources used, travelling party size, trip duration, recall of communities visited, travel activities, and expenditures. Of these trip-related variables, the two multiple-response variables (travel information sources used and recall of communities visited), were converted to index scores. On the survey, 13 selectable information sources were provided.

An index score of travel information sources was developed by dividing the number of information sources selected by the respondent by 13, and multiplying by 100. Likewise, an index score of the recall of the communities visited on PEI was calculated. On the survey, 28 communities in eight regions on PEI were provided. The index was developed by dividing the total number of regions recalled by 9, the number of regions listed, and multiplying by 100. The data analysis in this study proceeded in three stages. First, all respondents were grouped by using a *K*-means clustering procedure whereby a set of observations are partitioned into *k* groups (Pollard, 1981). This clustering method was employed to find disjoint clusters (SAS Institute, Inc., 1990) with the means of each cultural activity item serving as an input. In the second stage of the study, an analysis of variance (ANOVA), a multivariate analysis of variance (MANOVA), and discriminant analysis were performed. First, separate ANOVAs were conducted on each of the nine cultural activities to determine whether the variables in each cluster group differed. Next, MANOVA and discriminant analysis were run to check the overall significance of cluster group differences that statistically confirm the results of cluster analysis. Discriminant analysis was used to identify the cultural activity's influence on the cluster.

RESULTS AND DISCUSSION

Table 1 clearly illustrates that the 3,139 overnight pleasure tourists could be neatly partitioned into two cluster groups based on the nine cultural activities. Determination of the number of clusters is based on the examination of the *F*-statistics from a two-, three-, four-, and five-cluster solution derived from a *K*-means cluster analysis (Milligan and Cooper, 1985; Reynolds and Beatty, 1999). The two-cluster solution was the most meaningful and interpretable.

Table 1: Summary of Clustering, Anovas, MANOVA and Discriminant Analysis

	Cluster1	Cluster2	Total	<i>F</i> -value	<i>R</i> -square
Panel A: Clustering Statistics					
Number of observations in cluster	1,984	1,155	3,139		
Percent of observations in cluster	63.2%	36.8%	100%		
RMS Std. Deviation	31.9	45.1			
Maximum distance from the seed to observation	189.4	193.8			
Nearest cluster	2	1			
Distance between cluster centroids	129.2	129.2			
Panel B: ANOVA Statistics (in percent)					
Visiting historical/cultural attractions	17.0	87.5	42.7	2899.85***	0.480
Visiting Canada's birthplace attractions	6.4	60.5	26.1	1654.86***	0.345
Experiencing Acadian culture	11.0	60.5	29.0	1149.58***	0.268
Visiting Founders' Hall	3.3	40.2	16.7	892.05***	0.221
Visiting Anne of Green Gables attractions	25.2	74.0	43.0	872.87***	0.218
Going to a lobster supper (meal)	24.6	64.1	39.0	594.15***	0.159
Attending a cultural performance (live theatre)	7.3	29.4	15.4	309.94***	0.090
Attending a festival or event	9.3	31.4	17.4	284.96***	0.083
Enjoying evening entertainment (bar, pub, etc.)	7.5	19.2	11.8	95.40***	0.030
Panel C: MANOVA Statistics					
	<u>Value</u>	<u>df</u>	<u><i>F</i>-value</u>	<u><i>p</i>-value</u>	
Wilks' Lambda	0.251	10	1039.68	<0.0001	
Pillai's Trace	0.749	10	1039.68	<0.0001	
Hotelling-Lawley Trace	2.990	10	1039.68	<0.0001	
Panel D: Discriminant Statistics					
Posterior Probability Error Rate Estimates for Cluster	0.0548	0.0480	0.0514		
Hit Ratio (%)	(94.5%)	(95.2%)	(94.9%)		

Notes: Result of cluster analysis regarding participation in nine cultural activities. Based on responses from 3,139 overnight pleasure visitors to the 2004 Exit Survey for PEI. Two clusters were identified based on the nine cultural activities. Cluster 1 are "other interest tourists;" Cluster 2 are "culture-seeking tourists." The table provide statistics indicating the model was an excellent fit for the data. *** Significant at 0.1% level.

Panel A of Table 1 reports the clustering statistics. Of the 3,139 overnight pleasure visitors 1,155 (36.8%) were highly involved in cultural activities and are termed "culture-seeking tourists." The remaining 63.2% of visitors reported low rates of participation in culture related activities and are termed "other interest tourists." The remaining clustering statistics indicate that the clustering model was an excellent fit for the data. It is interesting that the percentage of cultural tourists reported in this study (36.8%) closely corresponds with the 40% reported by the OECD (2009). Panel B of Table 1 presents the ANOVA statistics for the two clusters. The numbers indicate the percentage of the respondents in each cluster that reported participating in the stated activity. For example, only 11% of the visitors in Cluster 1 reported that they experienced Acadian culture, while 60.5% of Cluster 2 reported this activity. A review of Panel B clearly illustrates that Cluster 1 has much lower levels of participation for all nine activities, thus supporting the labels used to describe the clusters.

The *F*-values in Panel B reveal that the mean scores for all nine of the cultural activities are significantly different at better than the 0.001 level for the two clusters. This result supports the method used to analyze the data. To further confirm the clusters, three types of MANOVA analyses testing the group differences in the cultural activity items was completed. The MANOVA statistics provided in Panel C of Table 1 were all significant at better than the 0.001 level. Clearly, there are two distinct groups evident in this data.

Discriminant analysis was performed to examine which cultural activity items highly contributed to the clusters (the *R*-square and *F*-value in Panel B) and what percentage of hit ratio (or posterior probability error rates) exists in the identified clusters (Panel D). The results indicate that the model correctly classified 94.9% of the survey respondents into cluster groups. Of the nine cultural activity measures, “visiting historical/cultural attractions” was the most significant contributor to the clustering segments, closely followed by “visiting Canada’s birthplace attractions.” The next three activities (experiencing Acadian culture, visiting Founders’ Hall, and visiting Anne of Green Gables attractions) were all very similar in terms of their contribution to the clustering model. The remaining four activities were significant but more minor contributors. The next stage of the study investigated whether there were any significant differences between the two groups of visitors with respect to trip-related characteristics.

These characteristics included geographical markets, types of visitation, travel information used, recall of communities visited, travelling party size, trip duration, travel activities, and travel expenditures. As shown in Table 2, statistically significant differences between the two groups were found in geographical markets and type of visit. The members of cluster 1 (other interest tourists) were the most likely to be from Atlantic Canada (41.3%), while Cluster 2 (culture-seeking tourists) were the most likely to be from U.S. (39.7%) and areas more distant from PEI like the western parts of Canada and other countries. It was also found that culture seekers were much more likely to be first-time visitors (63.6%) whereas other interest tourists were more likely to be repeat visitors (64.6%). It seems that once a visitor has been to PEI once, they have exhausted the cultural attractions available. This is consistent with results reported by Oppermann (1997), among others.

Table 2: Origin and Type of Visit by Cluster

	Cluster1 (n=1,984)	Cluster2 (n=1,155)	Total (n=3,139)	χ^2 value
<u>Visitor Origin</u>				
Atlantic Canada	41.4%	12.0%	30.6%	339.02***
U.S.	24.6%	39.7%	30.2%	
Ontario	14.8%	16.4%	15.4%	
Quebec	7.5%	7.3%	7.4%	
Other Canada	8.7%	16.6%	11.6%	
Other Countries	3.0%	8.1%	4.9%	
<u>Types of Visit</u>				
First-time Visitors	35.4%	63.6%	45.8%	234.77***
Repeat Visitors	64.6%	36.4%	54.2%	

Notes: Result of cluster analysis regarding participation in nine cultural activities. Based on responses from 3,139 overnight pleasure visitors to the 2004 Exit Survey for PEI. Two clusters were identified based on the nine cultural activities. Cluster 1 are “other interest tourists;” Cluster 2 are “culture-seeking tourists.” The table provide the origin and visit type of respondent. *** Significant at 0.1% level.

Table 3 provides an analysis of the various types of travel information sources used by visitors in the two clusters. The table provides the index variable of the number of travel information sources used and the percentage of those visitors who reported using the various types of travel information sources. There are a number of interesting findings. First, the Internet (PEI homepage and other tourism Websites) was the travel information source most widely used by all visitors, and for each of the groups. Clearly, the Internet has become a widely used source of travel information. (See Wang et al., 2002; Bieger and Laesser, 2004; Pearce and Schott 2005). Closely following this was the PEI travel information package, and word-of-mouth (information from friends, relatives, and co-workers). Next was travel information from tourist information centers, from the AAA/CAA, and from travel books. Getting information into visitor’s hands is important. Woodside et al. (1997) report that destination visitors who are high information users tend to participate more in activities, spend more money daily, are positive about their experiences, and are more intent to return compared to low and nonusers of information. However, some information sources

just contribute to the process of making travel decisions, others are “decisive.” Fodness & Murray (1998) report that independent external sources such as word-of-mouth advice and published travel guides help cement travel decisions.

Table 3: Comparison of Travel Information Sources Used by Cluster

	Cluster1 (n=1,984)	Cluster2 (n=1,155)	Total (n=3,139)	χ^2 value
Index of Travel Information Sources used	12.9	19.2	15.2	-14.59***
Internet/PEI Homepage/Tourism Web Site	40.8%	58.6%	47.4%	92.65***
PEI travel information package	33.1%	49.3%	39.0%	80.51***
Friends, relatives, co-workers	30.2%	36.7%	32.6%	13.90***
Tourist information centre in NS or NB	17.9%	26.6%	21.1%	33.10***
AAA/CAA Package	15.2%	30.2%	20.7%	100.64***
Geography or travel book on PEI or Canada	16.2%	28.5%	20.7%	67.32***
Television program or advertisement	4.8%	6.6%	5.4%	4.55*
Newspaper story or advertisement	4.0%	6.1%	4.8%	7.13**
Travel agent	1.8%	3.3%	2.3%	7.48**
Past experience	1.2%	1.0%	1.1%	0.19
Obtained information in PEI	0.6%	0.5%	0.5%	0.02
Maps/Atlas	0.5%	0.3%	0.4%	1.06
Other	0.8%	1.4%	1.0%	2.96

Notes: Result of cluster analysis regarding participation in nine cultural activities. Based on responses from 3,139 overnight pleasure visitors to the 2004 Exit Survey for PEI. Two clusters were identified based on the nine cultural activities. Cluster 1 are “other interest tourists;” Cluster 2 are “culture-seeking tourists.” The table provide the percentage of respondents using the various information sources available. ***, **, and * indicate the t-test result is significant at the 0.1%, 1%, and 5% level.

These findings are clearly supported by the results provided in Table 3. While the six information sources discussed above are used by both groups of travellers, it is clear that the culture-seeking tourists are significantly more likely to use these sources. Based on this, it would be expected that these visitors participate in more activities, spend more while at the destination, and be more positive regarding their experiences. These, of course, would be exactly the type of visitors all destinations desire. Visitors to PEI are less likely to use the next three information sources: television programs or advertisements, newspaper stories or advertisements, and travel agents. However, even for these culture-seeking tourists showed a higher rate of use. The final four items were insignificant information sources. Overall, the results in Table 2 indicate that statistically significant differences between the two groups of tourists were found in the index variable of travel information sources used and nine of the individual information sources. Culture-seeking tourists are much more likely to use travel information to plan the trip, and based on the literature that is a positive for the destination.

As presented in Table 4, statistically significant differences between the two groups of tourists were found in an index of recall of communities visited and in the percentage of tourists visiting the eight regions on PEI. Overall, it was found that culture-seeking tourists were much more likely to recall the communities visited on Prince Edward Island than other interest tourists. Culture-seeking tourists were most likely to recall spending time in Charlottetown, where the Canada’s birthplace attractions are concentrated. This is followed by the North shore area (Kensington, Stanley Bridge, Cavendish, and Stanhope) where the “Anne” attractions are located.

Table 4: Comparison of Recall of Communities Visited by Cluster

	Cluster1 (n=1,984)	Cluster2 (n=1,155)	Total (n=3,139)	χ^2 value
Index of Recall of Communities visited	30.7	47.0	36.7	-16.96***
Charlottetown	58.8%	82.4%	67.5%	186.11***
Kensington, Stanley Bridge, Cavendish, Stanhope	53.0%	79.9%	62.9%	226.23***
Summerside	38.2%	61.6%	46.8%	160.61***
Brudenell, Georgetown, Montague, Murray River, Wood Islands	38.7%	56.4%	45.2%	92.39***
Gateway Village, Victoria-by-the Sea, Cornwall, Fort Amherst	29.1%	45.1%	35.0%	81.88***
Tignish, Alberton, Mill River, O'Leary, West Point	20.7%	37.7%	27.0%	106.49***
Mount Stewart, Crowbush, St. Peter's, Souris	22.4%	30.9%	25.5%	27.95***
Tyne Valley, Wellington, Mont Carmel, Miscouche	14.4%	27.4%	19.2%	78.91***
Any other areas that you recall visiting	1.0%	1.6%	1.2%	2.88

Note: Result of cluster analysis regarding participation in nine cultural activities. Based on responses from 3,139 overnight pleasure visitors to the 2004 Exit Survey for PEI. Two clusters were identified based on the nine cultural activities. Cluster 1 are "other interest tourists;" Cluster 2 are "culture-seeking tourists." The table provide the percentage of respondents who could the communities visited on the trip. ***, **, and * indicate the t-test result is significant at the 0.1%, 1%, and 5% level.

Next is Summerside where the difference between the two clusters is the greatest. This is considered the start of the Acadian region on PEI. The Acadian area on PEI also includes the Tignish through to the Tyne Valley areas where large differences between the two clusters are also evident. Overall, cultural tourists are either more likely to visit more areas and communities, or a more likely to recall the visit at a later date. This fully supports the Woodside et al. (1997) results. It is also surprising since the other interest tourists were more likely to be from the sister provinces of Nova Scotia and New Brunswick and to be repeat visitors. It would be expected that these two groups of visitors would be more likely to recall the communities visited since they should know the Province better than more distant and first-time visitors. While the travel party size was essentially identical between the two clusters, culture-seeking tourists spent more time on PEI as shown in Table 5. While the difference is statistically significant, the difference from a practical perspective, 4.9 versus 4.2 nights, may seem modest. However, across the over 300,000 travel parties that visited PEI in 2004, the economic impact of such a difference is highly significant.

Table 5: Comparison of Travel Party Size and Trip Duration by Cluster

	Cluster1 (n=1,984)	Cluster2 (n=1,155)	Total (n=3,139)	t-value
Average Travelling Party Size (n)	2.91	2.96	2.93	-0.85
Trip Duration (average number of nights stayed)	4.19	4.98	4.48	-4.07***

Note: Result of cluster analysis regarding participation in nine cultural activities. Based on responses from 3,139 overnight pleasure visitors to the 2004 Exit Survey for PEI. Two clusters were identified based on the nine cultural activities. Cluster 1 are "other interest tourists;" Cluster 2 are "culture-seeking tourists." The table provide the travel party size and trip duration. *** indicate the t-test result is significant at the 0.1% level.

Results of independent t-tests indicated that the level of activities, other than culture-related, were also significantly different between culture-seeking and other interest tourists. As shown in Table 6, culture-seeking tourists were much more likely to participate in all but three of the activities: visit friends or relatives, camping, and playing golf. Given the much higher frequency of other interest tourists who are repeat visitors, it is not surprising that this group would be more likely to visit friends or relatives.

It is also important to note that for many of these activities, the differences in the participation rates between the two clusters are extreme. For example, the differences between the five most popular activities (the first five in Table 6) range from 46.7% to 103.4%. The average across the five was 72%. That is, across the five, the culture-seeking tourists were 72% more likely to engage in these activities than the other interest tourists. In addition, the differences were highly significant. Overall, while it is true that all overnight pleasure tourists engage in travel activities, the group that also engages visits

cultural attractions were more likely to also participate in other activities. Culture-seeking visitors are active while at a destination. While some of these activities are free (sightseeing, driving tour, hiking), many are costly activities that will have the effect of increasing the economic impact of these visitors.

Table 6: Travel Activity Participation Rate by Cluster

Travel Activities participated in (%)	Cluster1 (n=1,984)	Cluster2 (n=1,155)	Total (n=3,139)	t-value
Sightseeing	61.7	90.5	72.3	-20.64***
Beach visits	55.4	82.7	65.5	-17.28***
Craft/souvenir shopping	49.9	82.7	62.0	-20.73***
Visiting a national park	35.8	72.8	49.4	-21.81***
Driving tour	33.6	65.5	45.3	-18.19***
Shopping (general merchandise)	31.8	49.2	38.2	-9.65***
Visiting friends or relatives	30.0	20.6	26.6	5.99***
Confederation trail	12.6	38.8	22.2	-16.20***
Hiking	10.9	30.0	17.9	-12.55***
Camping	17.8	17.0	17.5	0.62
Bird watching	11.3	26.1	16.8	-10.03***
Visiting a theme, fun or amusement park	14.6	16.5	15.3	-1.39
Playing golf	13.6	10.6	12.5	2.56**
Boating/canoeing/kayaking/sailing	5.6	11.7	7.9	-5.60***
Cycling	5.3	8.0	6.3	-2.84**
Participating in a sports game (participant)	5.5	5.8	5.6	-0.30
Deep sea/salt water fishing	3.9	5.2	4.4	-1.68
Attending a sport event as a spectator	3.0	3.2	3.1	-0.36

Note: Result of cluster analysis regarding participation in nine cultural activities. Based on responses from 3,139 overnight pleasure visitors to the 2004 Exit Survey for PEI. Two clusters were identified based on the nine cultural activities. Cluster 1 are "other interest tourists;" Cluster 2 are "culture-seeking tourists." The table provide the percentage of respondents who participated in the stated travel activity. *** and ** indicate the t-test result is significant at the 0.1% and 1% level.

This finding is likely the result of the image of PEI in the minds of visitors. The brand for PEI is "The Gentle Island," and PEI is marketed as a place to "lay back and relax, a place to come to get away from your hectic lifestyle." Therefore, it is not surprising that about two-thirds of visitors come to do just that. These results should not be interpreted to mean that the other interest tourists have no interests or do not engage in activities, in general. It may simply mean that these visitors do not engage in many activities, *while visiting PEI*. If that is the case, it means the millions that the public and private sectors are spending on branding and marketing PEI is working.

This greater economic impact is clearly reflected in Table 7. Here it can be seen that statistically significant differences exist in most of the travel expenditure variables between the clusters. Overall, culture-seeking tourists spent significantly more money than other interest tourists, 46% more. To negate the effects of travelling party size and trip duration, spending is also calculated on a per person per night basis. Here as well, culture-seeking tourists are shown to spend 21.5% more money than other interest tourists. When considering the expenditure categories, the largest percentage differences were on admission fees, spending on souvenirs and crafts, and at restaurants and bars. Culture-seeking tourists spent more on most categories of travel expenditures than did other interest tourists. The exceptions were "groceries and liquor" and "sports and recreation." This may imply that these visitors were more likely to be camping or staying in a cottage or cabin.

Table 7: Comparison of Travel Expenditures by Cluster

Travel Expenditures	Cluster1 (n=1,984)	Cluster2 (n=1,155)	Total (n=3,139)	t-value
Average total spending per party per trip	\$818.36	\$1,193.70	\$957.86	-9.33***
Average spending per person per night	\$100.45	\$122.05	\$108.48	-6.44***
Spending on accommodations	\$35.21	\$42.03	\$37.76	-4.68***
Spending at restaurants and bars	\$23.16	\$28.98	\$25.33	-5.72***
Spending on groceries and liquor	\$6.10	\$5.28	\$5.80	2.66**
Spending on admission fees	\$5.23	\$7.92	\$6.23	-6.84***
Spending on shopping for souvenirs and crafts	\$8.90	\$12.77	\$10.34	-5.28***
Spending on shopping for other merchandise	\$5.13	\$5.08	\$5.11	0.10
Spending on auto/cycle related	\$11.76	\$14.17	\$12.66	-2.08*
Spending on sports and recreation	\$3.65	\$2.33	\$3.16	3.04**
Spending on night entertainment	\$0.98	\$2.05	\$1.38	-4.35***
Other spending	\$1.41	\$1.77	\$1.55	-1.06

Note: Result of cluster analysis regarding participation in nine cultural activities. Based on responses from 3,139 overnight pleasure visitors to the 2004 Exit Survey for PEI. Two clusters were identified based on the nine cultural activities. Cluster 1 are "other interest tourists;" Cluster 2 are "culture-seeking tourists." The table provide the spending reported by respondents while on the trip. ***, **, and * indicate the t-test result is significant at the 0.1%, 1%, and 5% level.

CONCLUDING COMMENTS

According to the OECD (2009), cultural tourism accounts for 360 million international trips a year (40% of global tourist demand) and thus is a vital market segment. However, this large segment has diversified and fragmented into many different niches. The purpose of this study was to test whether it is possible to segment the market of those who visit a destination, based on the activities pursued while visiting. Culture related activities were used as the basis for the segmentation analysis since culture is an important part of the tourism "product" for destinations around the world. A major Canadian tourist destination, Prince Edward Island, a small province on the east coast of Canada, was used as a case study. Data on a broad list of culture related activities was available from the 2004 exit survey for PEI.

If an activity or group of like activities is a useful market segmentation tool, then there should be significant differences in the activities pursued while on vacation between various groups of visitors. For this study, the basis for segmenting the market of visitors was nine activities that are clearly viewed as "cultural" in the terms of PEI as the travel destination. The primary analytical tool used in the study was cluster analysis. The first cluster was labelled "other interest tourists who accounted for the majority of overnight visitors to PEI in 2004 (63.2%). These visitors had relatively low involvement in the nine cultural activities. The percentage of these non-cultural visitors that engaged in one of these activities ranged from a low of 3.3% to a high of 25.2%, with an average of 12.4%.

The second cluster, "culture-seeking tourists" accounted for 36.8% of the overnight visitors to PEI in 2004. They were moderately to highly involved in the nine cultural activities. The percentage of these cultural visitors that engaged in one of these activities ranged from a low of 19.2% to a high of 87.5%, with an average of 51.9%. Clearly, the clustering analysis distinguished between these two groups of visitors, and indicates that segmenting the market of PEI visitors based on these variables is a valid procedure. In addition, the results indicate that there are significant differences between the two clusters with respect to trip characteristics. Culture-seeking tourists were more likely to be from geographically distant markets (i.e., more distant parts of Canada and other countries), be first-time visitors, use more travel information sources, stay more nights, have better recall of the communities visited, engage in many other non-cultural travel activities, and spend more money than the other interest tourists. On the other hand, these other interest tourists tended to be from closer markets (i.e., the other two Maritime Provinces of New Brunswick and Nova Scotia), be repeat visitors, visit friends or relatives and play more golf than culture-seeking tourists, and spend more money on "groceries and liquor" and "sports and

recreation.” One of the limitations of the study is that it cannot be definitively concluded that the visitors termed “culture-seeking tourists” are “true” cultural tourists. It is highly probable that not all of these visitors travelled to PEI solely, or even primarily, for cultural reasons and, thus, may not be “true” cultural tourists (McKercher and Chan, 2005). Different people will participate in cultural activities and visit cultural attractions at different levels, depending on their own interests, travel motivation, cultural distance, preferred experiences or activities, level of knowledge, perceptions of a destination, amount of pre-trip planning, trip-related characteristics, socio-demographic background, and other factors (McKercher and Cros, 2003; Prentice, Witt, and Hamer, 1998; Stebbins, 1996; Timothy, 1997).

However, based on the results of this paper, the visitors labelled “culture-seeking tourists” are significantly more engaged in cultural activities than the “other interest visitors.” It could be argued that for some, perhaps the majority, of these tourists, visiting cultural attractions was not a primary reason for their trip to PEI. If so, perhaps these visitors are not “true” cultural tourists. However, this group clearly seeks out and is actively engaged in cultural activities at much higher rates than the other interest tourists. Therefore, it can be concluded that segmenting the market of visitors to PEI based on culture-related activities is valid; this segment of visitors are very different from the other interest group of visitors.

But, it is also the case that additional research on cultural tourism may reveal more meaningful subgroups of cultural tourists, and more refined segments. Further research on tourism and culture should be undertaken, applying both qualitative and quantitative methods, to further investigate the importance of the cultural “product” in attracting visitors to a destination. However, it would be a mistake to limit this research to only those who report that they primarily travel for cultural reasons and seek a deep cultural experience. That is too restrictive a requirement and will have the effect of artificially reducing the apparent size of the culture-seeking market. This additional research could also be the basis for making comparisons between destinations, particularly islands, where the cultural “product” and the underlying reasons why tourists visit may be more easily defined. It has been suggested that culture is something inherent in the island tourism product rather than a niche market in itself (Cave et al., 2007; Cuccia and Rizzo, 2011). Islands are a distinct type of travel market and the culture of these unique places may well be a key motivating reason why many tourists visit (Jolliffe and Baum, 1999; Prohaska, 1995; Kocheil, 1994; Hennessey et al., 2012).

In conclusion, this paper illustrates that there are significant differences between “culture-seeking” and “other interest” tourists. The results for the other interest tourists seem to suggest that the millions that the public and private sectors are spending on branding and marketing PEI as “The Gentle Island” is working. These visitors seem to view PEI as a place to “lay back, relax, and get away from our hectic lifestyle.” However, cultural themes are an important factor for a significant portion of tourists visiting PEI and demonstrated that these culture-seekers are valuable in terms of their economic contribution to the destination and cultural/social interaction with communities. These culture-seeking tourists also prefer to participate in other activities especially those related to nature, recreation, and entertainment.

This result may also impact public policy and the investment made in a destination’s tourism “product.” Cultural tourism can result in the preservation of a destination’s cultural heritage and values for future generations, resulting in positive attitudes toward tourism by both residents and visitors (McKercher, 2001). Tourism marketers and operators may wish to emphasize culturally unique elements of a destination and provide a variety of travel information sources to appeal and attract more distant (mid- and long-haul) markets and first-time visitors and reduce the seasonality of tourism (Cuccia & Rizzo, 2011). Destinations that cater to these needs may experience increased tourism demand and a growing supply of cultural attractions. Those that do not may struggle to find a sustainable consumer base.

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