Culture and Heritage Tourism Experience: Key themes

**Audience:** The 9th UNWTO/PATA Forum on Tourism Trends and Outlook (Guilin, China)

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Culture and Heritage Tourism
What is it?
What is Culture and Heritage Tourism?

Having read thousands of pages on the subject, it seems that.....
What is Culture and Heritage Tourism?

It depends who you are talking to.

So....
What is Culture and Heritage Tourism?

...as part of this we will provide a definition that will be useful for the industry
Let’s start with the different types of culture and heritage

**Heritage**
- Built environment
- Former ways of living
- Significant natural locations
- Skills & traditions

**Culture**
- Arts & Literature
- Contemporary way of life (including sport)
Key themes for culture and heritage tourism

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<th>Authentic</th>
<th>Enriching</th>
<th>Tied to place</th>
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<td>Distinct or unique</td>
<td>Participation</td>
<td>Self-defining by contrast or similarity</td>
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<td>High quality</td>
<td>Iconic</td>
<td>Self-expression</td>
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<td>Respectful</td>
<td>Inclusive</td>
<td>Connected</td>
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Two definitions

Culture and Heritage Tourism

- any trip where the major motivation is the cultural and heritage experience even if other activities are undertaken

Cultural and heritage experience

- a specific activity undertaken either as part of a culture and heritage trip or which can be a part of a broader trip where the primary motivation is different

Use to SIZE the market?

Combine with above to VALUE the market?
Two trips to demonstrate this
culture and heritage tourism

Trip to Rome and Krakow
- Primary motivation was to experience the place, understand amazing buildings, discover culture and history, live like a local
- Also had fantastic food and wine experiences

Trip to Geelong
- Primary motivation visit emerging Geelong wineries
- But did culture and history trail in city
- Visited Werribee Park historic house
- Also went walking in National Park
- But none of these were the trigger for the trip
Culture and Heritage Tourism
Who does it?
We need to look beyond demographics ... And consider context

- The demographic profile of culture and heritage tourists varies by destination

A typical cultural and heritage visitor to Europe skews under 45

Both international and domestic tourists in the US skew older

Sources: ETC, Visit Britain, OTTI
One key measure – the 3 Wells

Well-Educated: More likely to have college or university degrees than the general traveller, and willing to do homework, often arriving with detailed prior knowledge of the attraction.

Well-Heeled: Enjoying significantly higher incomes than general travellers, thanks to an older demographic profile and higher education levels.

Well-Travelled: Taking more trips per year compared to general travellers.

Source: OTTI, Sector Profile, Cultural and Heritage Tourism
There’s more than 1 type of cultural tourist (1 – US domestic)

**Passionate** Cultural/Heritage Leisure Travelers: Leisure travelers who participate in Cultural and Heritage activities to a larger extent than other segments. And for a large percentage of this group, these activities are a driver of destination choice.
- 13% of leisure travelers or 23 million leisure travelers

**Well-Rounded/Active** Cultural/Heritage Leisure Travelers: Leisure travelers that are open to experiencing all types of activities while on a leisure trip, including cultural and/or heritage activities.
- 14% of leisure travelers or 24 million leisure travelers

**Aspirational** Cultural/Heritage Leisure Travelers: Leisure travelers who desire to experience and participate in cultural/heritage activities, but have limited experiences with cultural activities during their most recent trip and during the past three years.
- 27% of leisure travelers or 46.3 million leisure travelers

**Self-Guided/Accidental** Cultural/Heritage Leisure Travelers: Leisure travelers who take advantage of cultural/heritage activities while on a leisure trip, but cultural/heritage activities aren’t the driver for their destination choices. They most often prefer exploring small towns, galleries and self-guided historical tours.
- 11% of leisure travelers or 18 million leisure travelers

**Keeping it Light** Cultural/Heritage Leisure Travelers: Leisure travelers that don’t seek out cultural/heritage activities but will attend what they perceive as fun art, cultural and musical events.
- 11% of leisure travelers or 18.5 million leisure travelers
There’s more than 1 type of cultural tourist (2 – UK international)

Culture visitors can be classified into the following categories:

• The purposeful cultural tourist /culture vulture - cultural tourism is the primary motive for visiting a destination and the tourist has a deep cultural experience.

• The sightseeing cultural tourist - cultural tourism is a primary reason for experiencing a destination, but the experience is less deep.

• The serendipitous cultural tourist - A tourist, who does not travel for cultural reasons but who, after participating, ends up having a deep cultural experience.

• The casual cultural tourist - cultural tourism is a weak motive for travel and the resulting experience is shallow.

• The incidental cultural tourist - the tourist does not travel for cultural reasons, but nonetheless participates in some activities and has shallow experiences.

Source: Visit Britain
There’s more than 1 type of cultural tourist (3 – Canadian both domestic and international)

By breaking down the sector further, it is easier to see demographic splits – and thus buy media to profile
Some key factors that define these segments

- Tick list
- Level of immersion
- Participate
- Chancers
- Spontaneity
- Planners
- Part of the place
- C&H as a driver
- Culture vultures

These need to be considered for both marketing and product development
But we can’t assume that the most passionate offer the highest yield.

Well rounded US travellers may represent the most lucrative travellers.
Culture and Heritage Tourism: Why do we care about it?

Source: Maui.co.nz
Lots of reasons to care!

- Economic impact
- Innovation
- Growth
- Connection and emotion
- Conservation
Some really big numbers
Culture and heritage tourism

Estimated direct benefit $625bn dollars to the global economy

Estimated direct benefit $327bn in Asia Pacific

Estimated indirect benefit in Asia Pacific = $1,000bn

Directly supports 50 million jobs in Asia Pacific

Indirectly supports 70 million jobs in Asia Pacific

In NSW Australia, $7.9 bn in expenditure

Sources: UNWTO, WTTC, PATA, DNSW, MTR estimates
In the US, OTTI estimates that culture and history tourism outperformed the market in 2012.

Source: Culture and Tourism – A Naturally Strengthening connection? Greg Richards, Tilburg University, Presented at the Board Failte, 2013 National Tourism Conference.
Conservation

Connection and emotion

“A good place to live is a good place to visit.”
– Dr. Brian White

ANZAC 100 YEARS - France Australia
Innovation

Source: Heritage lottery fund

- Across the UK, the businesses based in listed buildings are highly productive and make an estimated annual contribution to UK GDP of £47 billion and employ approximately 1.4 million people. This represents 3.5% of the UK’s ‘gross value added’ (GVA) and 5% of total UK employment. Not all historic buildings are listed – adding the non-listed would make these figures even higher.

- In the places we surveyed, a commercial business based in a listed building generates an average of £308,000 in GVA per year – 4.4% higher than the average for all commercial businesses across the UK. Rather than being a drag on productivity, listed buildings attract businesses in the most productive sectors of the economy.

- The ‘heritage premium’ associated with the occupation of these listed buildings – the extra GVA they generate over and above the amount generated by an equivalent number of businesses in non-listed buildings – is £13,000 per business per year.
Why do we care – a triple bottom line

Here are many ways cultural/heritage tourism can benefit communities:

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<th>Economic</th>
<th>Social</th>
<th>Environmental</th>
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<td>- Diversifies the local economy by creating new jobs, businesses, attractions and events.12</td>
<td>- Enhances the community's image and pride. 15 16 17</td>
<td>- Contributes to a culture of preservation.</td>
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<td>- Brings in new money and generates tax revenues.13 14</td>
<td>- Encourages community beautification.</td>
<td>- Encourages residents and visitors to consider their impact on the natural and built environment.</td>
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<td>- Supports existing small businesses and provides options for expansion.</td>
<td>- Creates opportunities for healthy community relationships and partnerships. 18 19</td>
<td>- Increases awareness of the site, attraction or area's significance.</td>
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<td>- Promotes the preservation and protection of significant local resources.</td>
<td>- Creates experiences for visitors attracted to history, preservation, and the cultural arts, which can then also be enjoyed by residents.</td>
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<td>- Builds relationships among and within communities.</td>
<td>- Preserves local traditions, customs and culture.</td>
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<td>- Helps develop and maintain new/existing community amenities.</td>
<td>- Provides education, research and work-placement opportunities for students.</td>
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<td>- Generates increased local investment in heritage resources and supporting tourism services.</td>
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Culture and Heritage Tourism: What should we do about it?
Three broad things to consider

1. Capability
   What have we got?
   (what's possible with our natural and cultural resources?)

2. Suitability
   What will we share?
   (what's appropriate or desired in our community?)

3. Feasibility
   What do our guests want?
   (what's economically sustainable?)

Create an inventory

Work with the community
Make sure majority is on side
Be sensitive to community needs

Make sure there are enough people interested in what you have

Obtaining answers to these questions through the three steps above will help your community chart the right course ahead.

Who needs to be part of the consultation?

Cultural/Heritage Tourism: Who’s Involved

This diagram shows the wide range of stakeholders—and potential collaborators—that can be involved in your community’s cultural/heritage tourism strategy.

1. **Visitor or Resident:**
   the audience for cultural tourism activities & products.

2. **Operators (Ops):**
   directly interact with visitor/resident.

3. **Sector Groups:**
   operator interest groups.

4. **Governments:**
   agencies with related mandates.

5. **Social Sectors:**
   broad segments of society.

## Critical success factors for Culture and Heritage Tourism

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<th>Factor</th>
<th>Have you done this?</th>
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<td>Agreed objectives and clear concepts</td>
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<td>Financial planning for budgeting, capital raising and price setting</td>
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<td>Effective marketing strategies based on sound market research</td>
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<td>Matching the plans to destination nature, proximity to major markets and visitor flows</td>
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<tr>
<td>Human resource management, including paid staff and volunteers</td>
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<tr>
<td>Planning for product differentiation, life cycles and value adding</td>
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<tr>
<td>Quality and authenticity of products and experiences</td>
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<tr>
<td>Engage cultural heritage and tourism expertise in conservation and promotion</td>
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<tr>
<td>Design interpretation as an integral part of the heritage tourism experience...</td>
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<td>And vice versa... Conduct heritage to manage visitors from the beginning</td>
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Source: CRC for Sustainable Tourism, MTR
Key steps

Destination plan

Prepare your people

Prepare your places

Prepare your activities

Develop your themes and clusters

Measure success

Celebrate and repeat!
Common themes

- Consult Widely
- Plan it thoroughly
- Resource it
- Know your assets
- Be prepared
- Know your market
- Go for quality
- Distinctiveness
- Relevance
- Tell stories
- Package and theme
- Measure your progress
Culture and Heritage Tourism: Q & A
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