Cultural Tourism in Ontario

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The comments and diagrams on Cultural Tourism presented here are drawn from a study on Ontario's Cultural Tourism Product done for the Ontario government by LORD Cultural Resources Planning & Management Inc. The approach will be illustrated with reference to cultural planning work that our firm has undertaken in Singapore and Australia.

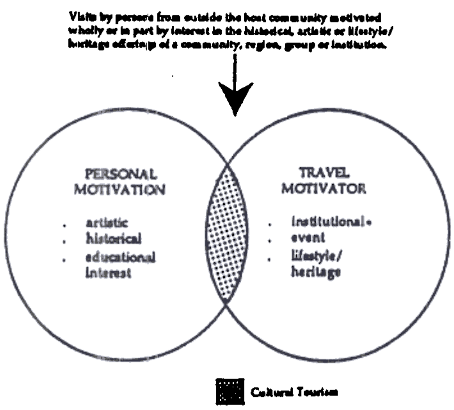
By 1984 there was almost 300 million international tourist arrivals world-wide and international tourism was the second largest item in world trade. It is predicted that by the year 2000 tourism will be the world's largest industry and its largest employer.

In the early 1980s the World Tourism Organization became interested in defining the concept of cultural tourism, based on the recognition that, unlike recreational tourism, cultural tourism is motivated by th need in travellers for increased knowledge and new and different experiences.

In 1982, the following definition of cultural tourism was offered in *Tourism: Principles, Practices and Philosophies:*

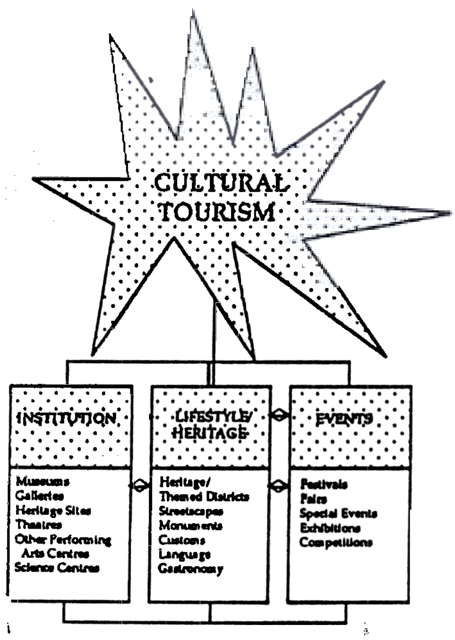
Cultural tourism covers all aspects of travel whereby people learn about each other's way of life and thought (1982:23).

CULTURAL TOURISM



Our typology focuses on the product and on how it is organized. The three main categories of cultural tourism products we have identified are: Institution-based, Lifestyle/Heritage-based and Event-based. The diagram on the following page illustrates the typology of cultural tourism. The "starburst" symbolizes the dynamism of cultural tourism. The horizontal arrows indicate how institutions, lifestyle/heritage attractions and events are frequently linked. For example, a festival may hold events in institutions and streetscapes.

TYPOLOGY OF CULTURAL TOURISM



Trade experts make the distinction between those businesses that are "export willing" and those that are "export-able". This terminology differentiates between those companies that wish to export goods or services and those that are capable of doing so. This latter group produces "exportable" goods and services and has the resources required to engage in international trade in a sustained way.

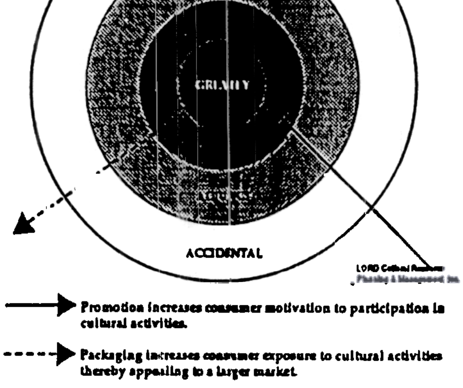
Some existing cultural tourism products are currently "able" to attract visitors from outside. At the other end of the spectrum, there are cultural tourism products that are not currently attracting visitors from outside but have established this as a goal – the "willing". In the middle of the spectrum will lie those cultural products that are not only willing but are in a position to take advantage of the cultural tourist market. These products may be seen to be "ready", but not yet "able".

CULTURAL TOURISM PRODUCT CONTINUUM

Strategic Direction moves product toward Export-ability

In the figure below, the centre symbolizes those tourists who are motivated in their travel decision-making primarily by cultural factors. The next group are those tourists who, while not greatly motivated by cultural factors, take the cultural offerings of a location into consideration when making travel plans. The third group are those tourists whose decision-making is not informed by the availability of cultural attractions, but who view taking part in cultural activities as an important adjunct to their main activities. Finally, there are those tourists who may not view taking part in a cultural activity while visiting another area as an important adjunct to their main activities, but who find themselves as "accidental", or unplanned cultural tourists. Outside the outer circle are those with no real interest in culture.

DEGREE OF CONSUMER MOTIVATION FOR CULTURAL TOURISM

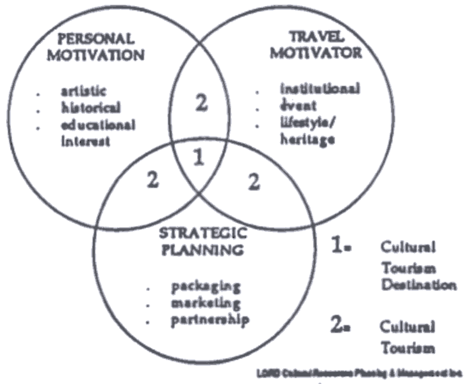


Tourism literature stresses the importance of the "destination" as a travel generator. A destination is more than the sum of tourism products in an area.

Much of the literature focuses on promoting and packaging a number of cultural products in an area to create a cultural destination, such as, for example, a heritage tour. This approach appeals mainly to the tourists motivated greatly to participate in cultural activities.

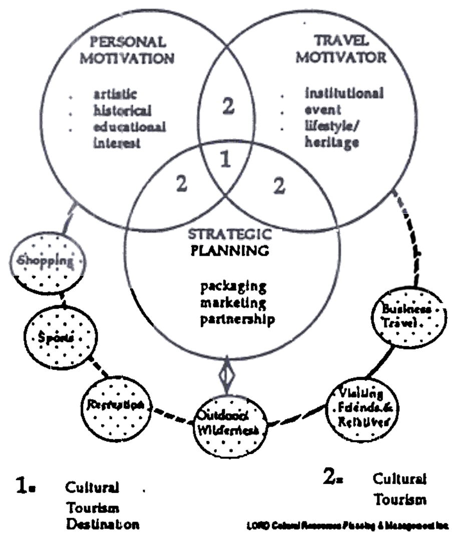
There are few examples of promoting and packaging cultural products across the cultural tourism typology. For example, cultural tourism packaging tends to occur within each sector – institutions tend to package together (a museum package of four museums) rather than with lifestyle/heritage attractions or events. Packaging across the typology would create a more attractive cultural tourism destination for the larger market of tourists motivated greatly, and in part, to participate in cultural activities.

CULTURAL TOURISM DESTINATION



The most effective approach is to create a popular destination by packaging cultural tourism products with other, non-cultural tourism products, as illustrated in the diagram below.

CULTURAL TOURISM IN THE CONTEXT OF DESTINATION MARKETING



The data comparing tourists who participate in cultural activities with the average tourist indicates that those interested in culture possess characteristics sought after by the tourism sector as a whole.

High Education and Income

All of the data indicate that the higher the level of education of an individual the more likely this person is to be interested in culture. Education is the most important indicator of interest in cultural activities.

Spend More Money

The data here point to the advantages to other sectors of the tourism industry to target the market interested in culture. This includes opportunities for packaging and other forms of cooperation not only with tourist attractions and accommodation establishments but with shopping malls and business districts as well.

More Likely to be Women than Men

That women are more likely than men to take part in cultural activities is confirmed for all of the data, particularly related to performing arts and art galleries. They are also more likely to make travel and educational decisions for their family.

Recreational and sports tourist products such as golf, fishing and hunting which are more male-oriented but which would like to widen their appeal to women and the overall family market would benefit from packaged arrangements with culturai tourism products.

Vary by Age and Party Composition by the Type of Cultural Product

The data indicate that non-cultural tourist attractions and accommodation establishments which are targeting parties of adults travelling without children would find a good fit in packaging with performing arts and art galleries while those targeting the family market would benefit from cooperative arrangements with most museum types and historic sites.

Data comparing tourist show that cultural tourists spend more time and money in an area than the average and are therefore a segment which should be courted by the tourism industry as a whole.

Spend More Time in an Area

Overnight visitors to an area are also more likely to attend cultural events or attractions. Those staying for several nights are more likely to attend than those staying for only one night.

Are More Likely to be Pleasure Travellers

There are four main reasons why people travel which may be categorized by purpose of trip: visit friends and relatives, pleasure travel, business, and personal reasons. Among the four, persons whose main purpose is pleasure travel are most likely to attend cultural attractions and events. Pleasure travellers are the market segment targeted by most tourism products.

Are More Likely to Stay at Hotels or Motels

Are More Likely to Shop

The information above clearly shows that tourist operators would benefit by linking their services to cultural institutions, events and activities.

The travel profile of the mature market is reported as follows:

* longer average trip (6.3 nights compared to 4.6 nights for 18-54 age category)
* more likely to travel off-season, especially in the autumn
* more likely to take escorted tours (20% of all mature travellers take escorted tours)
* more likely to shop, particularly to purchase gifts for loved ones (89% were reported to have gone shopping on recent vacation trips)

According to a National Tour Association study, the factors for selecting destinations by the mature market, in rank order, are as follows:

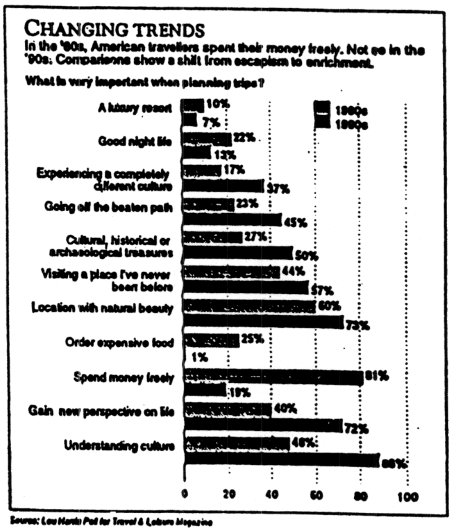
1. cost
2. new desinations
3. cultural events
4. prior experience
5. personal recommendations

The fact that culture ranks higher than prior experience or personal recommendations indicates that targeted and sustained marketing to this segment and to the tour operators that serve them can be successful. Other tourism products seeking to target the mature market would be well served to package with cultural tourism products.

The current mature market is already motivated by their interest in cultural events in selecting travel destinations. The aging of the baby boom generation, which is more educated and likely to be more healthy and active in retirement, and to be even more interested in cultural tourism, is very positive for the future of cultural tourism products.

Demographic, socioeconomic, lifestyle, travel and institutional trends have had a major impact on the growth of the cultural tourism market.

The attached chart published in the Globe & Mail on January 9, 1993 illustrates the dramatic growth of cultural tourism in the last decade. It shows that the single greatest motivator for travel in the 1990s is "understanding culture" (88%). Fifty per cent of travellers interviewed said that "cultural, historical or archaeological treasures" are important in planning a trip.



Source: Lou Harris Poll for Travel & Leisure Magazine

This growth in cultural tourism is the result of the following trends.

DEMOGRAPHIC AND SOCIOECONOMIC TRENDS

A. *Higher levels of education have greatly increased demand for both culture and tourism.*

The trend to higher levels of education is projected to continue to increase and is very positive for both tourism and culture.

B. *Women are Increasingly recognized for their role in selection of travel destinations and attractions.*

Women represent half the population but often account for 55% to 65% of those attending art galleries, most museum types, performing arts, festivals, and other cultural attraction and events.

Overall women face more impediments, such as less disposable income, responsibilities for child rearing and the social pressure to find someone to go with, to attending these events.

Women are increasingly recognized for their role in selection of both travel destinations and the selection of specific attractions and events. This relates to a number of key factors:

* Women generally make the decisions in a household regarding the educational experiences of their children.
* Women tend to make the decisions regarding attractions to visit while on family vacations.
* Women account for a large majority of bus tour passengers, trip planners, convention planners and travel incentive planners.
* Women represent a large majority of elementary school teachers who usually make the decisions regarding school field trip destinations.

The fact that women are working, earning money and therefore controlling more disposable income than in the past has changed the cultural agenda around the world.

For tourist activities which are male-oriented (hunting, fishing, golf, etc.) packaging with cultural attractions and events whose audiences include a higher percentage of women opens opportunities for mutual benefit.

C. *The large baby boom generation is entering the peak years in the life cycle for cultural attendance*

It has been found that cultural participation among adults increases with age. It used to be assumed that attendance declines at about age 65 but this has been less so in more recent surveys, reflecting the better health of retirees and the income they have saved.

The increased attendance through middle age is closely related to the economics of the life cycle in which parents of young children are in a period of acquisition (home, furnishings, car, etc.), limiting both disposable income and time available for culture and travel.

Attendance at cultural attractions increases as the children enter school, because parents have more time available and wish to expose their children to culture as an enriching educational experience. Cultural attendance continues to increase when most of the family acquisitions have been made. Peak cultural attendance is reached when the children have left home. The same pattern applies to travel.

Since education and the example of parents are the biggest influences on whether people will be cultural attenders, the children of the baby boomers will likely be an even greater cultural market in the future.

LIFESTYLE TRENDS –

D. *Less leisure time*

Less leisure time has emerged largely from an increasingly competititve labour market in periods of high inflation and the growth in the percentage of women in the labour force. Despite the growing popularity of culture, less leisure time means fewer opportunities to attend cultural attractions or events.

For tourism, less leisure time and the growth of two income households have contributed to the movement to more mini-vacations and escapes as opposed to the longer vacations of the past.

For cultural tourism, the key issue is whether the growing popularity of culture combined with fewer opportunities to attend in one's own community creates a latent demand to attend when travelling? If so, how may such a latent demand be turned into actual attendance?

E. *A tendency for people to spend more time at home*

Less leisure time, combined with a tendency to stay at home by the large baby boom generation reduces demand for cultural attractions and events and other tourism destinations.

F. *Greater health and appearance consciousness*

One of the by-products of the aging of the baby boomers is an increased societal consciousness of health and appearance. Even before the most recent warnings of the impact of ultra-violet (UV) rays, the concern of baby boomers about UV had already led to dramatically higher sales of sun block and wrinkle creams and reductions in the time many people spend in the sun or vacationing on the beach.

INSTITUTIONAL TRENDS

G. *Greater levels of competition*

It is not only the labour market which has become increasingly competitive over the past two decades. Within the cultural sector the supply of attractions and events has grown at a dramatic pace internationally.

Packaging and other forms of cooperation among cultural attractions and events increases the perceived value of the products within the package, reduces the competition among products and may lead to lower costs by reducing duplication of efforts.

In conclusion, colour slides will illustrate the opportunities for cultural tourism in two sites in the Asia-Pacific region where LORD Cultural Resources Planning & Management Inc. has done planning studies: the Museum Precinct of the National Museum, Singapore, and the Batavia Coast of Western Australia. The Museum Precinct is an urban district around the present National Museum where LORD has done the long-range Master Plan and the Functional Brief for the conversion of the former Saint Joseph's Institution into the Singapore Art Museum, as part of a plan to provide cultural tourism attractions between two major shopping districts. That "Museum Precinct" is now being relocated to include the preservation of some important nearby historic buildings.

The Batavia Coast of Western Australia is an interesting case where the cultural tourist designation of the Coast is leading toward the proposed development of a facility, to relocate at least some significant portions of the wreck of BATAVIA, a Dutch 17th-century vessel recovered from waters off the Abrolhos Islands, which has been preserved at the Western Australian Maritime Museum in Fremantle but which the "Batavia Coast" advocates believe should be moved north as part of their cultural tourism strategy. The new museum would incorporate many other aspects of the region's natural and cultural heritage, and could be "packaged" with other attractions in the region.