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CULTURAL TOURISM: THE SUCCESS STORY

BY

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ABSTRACT

As we enter the 21st Century, when tourism is projected to be the world's largest employer, it is particularly important to examine the role of cultural tourism because cultural tourism focuses on the meanings and patterned ways of being that are fundamental to identity and self-worth. This paper examines the role of cultural tourism in preserving culture--a central element in building a sustainable world.

What is cultural tourism? [Figure 1] The company of which I am President, LORD Cultural Resources Planning and Management Inc., is an international museum planning firm which undertook a major cultural tourism study for the Province of Ontario in 1993. We found that cultural tourism is defined as visits by persons from outside the host community motivated wholly or in part by interest in the historic artistic, scientific or lifestyle/heritage offerings of a community, region group or institution".

Figures accompanying this text are reproduced from that study.

As you can see in Figure 1, Cultural tourism--like other forms of tourism--brings together the personal motivation (the market) with the travel motivator (the product).

Let's look briefly at the characteristics of each of these.

First, the product [Figure 2]. By cultural tourism products we refer to institutions, lifestyle/heritage opportunities and to events. As you can see there are a variety of examples of each--and these examples can be created expressly for the visitor (a museum or festival, for example) or may simply be inherent in the community (restaurants, streetscapes) or they may be a combination of both. The degree to which a cultural product is made accessible to cultural tourism is essentially a community decision--or should be. This factor of self-determination is critical to both the authenticity of the product (ultimately its sustainability in terms of community cultural identity) and to its effective marketing (also ultimately this sustainability as a tourism product).

[Figure 3] We all know that the better the cultural product the greater the likelihood that residents will spend money within the region, province or country. Even more important is the ability of cultural products to attract or increase the length of stay of long-haul tourists because they bring in new money. In this regard, the reality is that not every cultural product, and certainly not every museum or theater, is willing or capable of being a significant tourist attraction, nor need they be. For example, a community theatre on local issues, or a religious festival may be planned only for the immediate community.

There is a continuum of cultural products from those liable to attract tourists to those which are "willing" to do so. "Ability" has very much to do with the 8 points listed which serve as a check-list to help cultural products to be evaluated or to evaluate themselves for "exportability".

At the other end of the spectrum are cultural products that are not currently attracting tourists but have established this as a goal--we call these the "willing". In the middle are those who are not only willing but "ready" to make a commitment to enhance their product and services.

Many cultural facility or event managers make the point that a dollar is a dollar whether that dollar is from a resident or a tourist. However, if tourists from out of state or out of the country pay to attend a theater performance, museum or festival, the community is in essence exporting its products and earning currency for the community and the state and country.

A key element in our cultural tourism strategy is therefore to move more cultural products from being "export-willing" to

"export-ready" to "export-able." If they wish!

CHANGING TRENDS

Now let's look at the Cultural Tourism market. [Figure 4] Cultural tourism has since ancient times been a motivation for travel. For hundreds of years the "Grand Tour" was considered an essential part of a gentleman's education. But, of course, that was a tiny minority of the general population. Unfortunately, that image has stuck. The reality is that cultural tourism along with ecotourism are among the fastest growing market segments. Why? Because education is no longer a gentleman's pastime--it is essential to survival. This figure demonstrates the paradigm shift that has taken place in the US in the last ten years alone.

In the '80s, American travellers spent their money freely. Not so in the '90s. Comparisons show a shift from escapism to enrichment.

What is very important when planning trips?

Remember that these are the frequent travellers, not the general public but see how the importance of culture has increased. In the '80s cultural, historical or archaeological treasures were important to 27% of frequent travellers compared to 50% in the '90s. Understanding culture was important to 48% in the '80s compared to 88% in the '90s. One conclusion is that the economic realities of the 1990s had brought about a shift from what Harris termed "escapism" to "enrichment" which is reflected in data showing the dramatically increased importance of culture as a travel motivator. But there are other forces at work--they

have been at work of some time--which we believe have led to a paradigm shift that will long outlast the current recession. For example:

- * higher levels of education, since all studies show that persons in higher education categories are more likely to be culturally oriented.

- * the increasing numbers of women in our society in positions of power and authority, since women tend to be more culturally-oriented than men.

- * the aging baby boom generation which in the US and Canada is the large and wealthy group born from 1946 to 1964 and in Europe is the group born from 1950 to 1969.

- * less leisure time but a greater emphasis on quality time experiences which cultural facilities and events offer.

- * and even greater health and appearance consciousness with concerns for the effects of ultraviolet rays causing travellers to seek out more indoor cultural opportunities. Sun and Fun is no longer enough. It is not sustainable.

[Figure 5] Just as not every cultural product is willing, ready or able to attract tourists, not every person is interested in culture. However, a key finding of our study is that there are different degrees of consumer motivation for cultural tourism which many tourism surveys have not taken into account. This phenomenon is explained by the concentric circles shown. At the center, the smallest circle, are persons "greatly motivated" by culture, people who travel to a city specifically because of its theater opportunities, museums and cultural

festivals. For example, on average 40% of theatre seats in Toronto, London and New York are sold to tourists. We estimate this segment at about 5% of the resident market and 15% of out of province tourists. The difference in the figures for residents and tourists is explained by the fact that the higher education income persons most likely to travel also tend to be more interested in culture.

The second circle represents persons motivated "in part" by culture, persons who travel to the city both because of the cultural opportunities and, say, to visit friends or relatives. Those motivated in part account for about 15% of the resident market and 30% of the tourist market.

The third circle, which represents about 20% of both markets, involves people for whom culture is an "adjunct" to another main motivation. That is, the main motivation for choosing to visit might be for hiking, but while there, visitors will plan to include cultural opportunities in evenings.

The outer circle is what we refer to as the "accidental cultural tourist," also about 20% of the market. This includes people travelling to the city who do not intend to go to a cultural attraction or event but find, for example, that the friends or relatives they have visited bring them along or that the cultural opportunity is close to their hotel. Attendance is not planned in advance, but is accidental.

Outside the circles, representing about 40% of the resident market and 15% of tourists, are persons who wouldn't attend a cultural attraction or event under any circumstances. When we have a potential of 60% Of the resident market and 85% of the tourist market, this is not a target market!

Whereas the strategy for culture products is to move more of them along the continuum from "willing" to "ready" to "able", the strategy for increasing the market is focused on widening the appeal of culture from the small percentage "greatly motivated" to larger percentages "motivated in part", as an adjunct to another motivation, or to "accidental cultural tourists through partnership and packaging arrangements in which there are cultural and non-cultural opportunities.

[Figure 6] This concept of packaging, partnership, marketing and collaboration to create cultural and non-cultural opportunities in one place or at one time is crucial to creating a cultural tourism destination. You get cultural tourism by bringing together the travel motivator (that is, the cultural product) with the personal motivation (that is, the market for culture). But creating a cultural tourism destination takes strategic planning built on an understanding that there are different degrees of consumer motivation for culture and that most people are looking for a variety of things to do when they travel.

In other words, a destination is, by definition, a place which people plan to visit. A cultural tourism destination may be created by understanding the great variety of travel motivators and personal interests of tourists so that cultural facilities and events may capitalize on opportunities to attract the large numbers of people who are not greatly motivated by culture but who have some level of interest.

So the key strategy is the mix. Not museums with museums (the hard core will find the museums). But museums with shopping, theatre with baseball etc.

[Figure 7] But why should tourism operators, most of whom are private sector, for profit, hard-nosed bottom line types be interested in packaging and partnership opportunities with cultural facilities and organizations, most of which are not--for profit? A key part of the answer is that the demographic, socioeconomic and behavioral profile of the cultural tourist is what others in the tourism sector are seeking to target.

What is the profile of the cultural tourist? Of course there are differences by type of cultural product, but in the United States and Canada the data generally indicate a very common pattern in which the cultural tourist:

- * Earns more money and spends more money while on vacation
- * Spends more time in an area while on vacation [Figure 8]
- * Is more likely to stay at hotels or motels [Figure 9]
- * The cultural tourist is far more likely to shop
- * Is more highly educated than the general public
- * Includes more women than men. (Women represent a higher proportion of shoppers and bus tour passengers)
- * And cultural tourists tend to be in older age categories. (This is particularly important with the aging of the large baby boom generation.)

Why is Cultural Tourism the success story? It is a renewable community resource--a tourism product which if well and

democratically managed can enhance the quality of life of communities. The cultural tourism market is a specific segment of the

population that will continue to grow in societies where education and equality increase as social values.

Figure 1: Cultural Tourism

Cultural Tourism

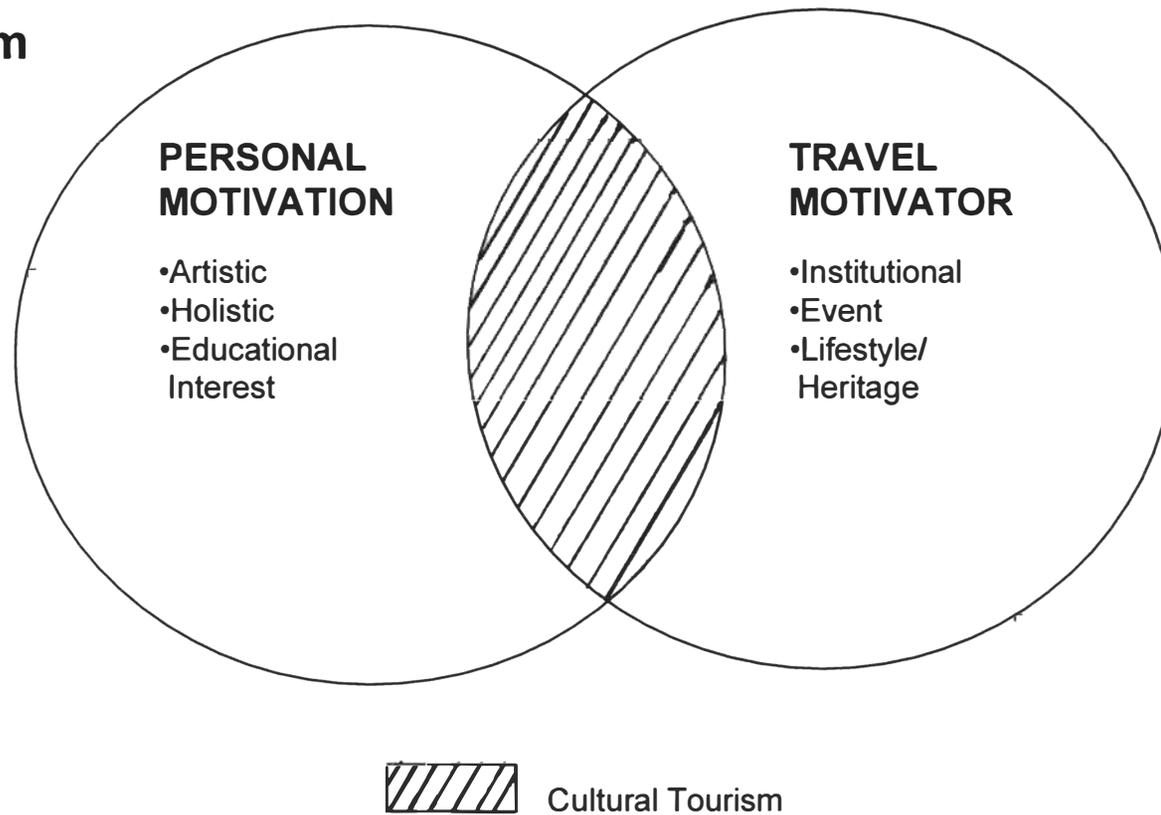


Figure 2: Cultural Tourism

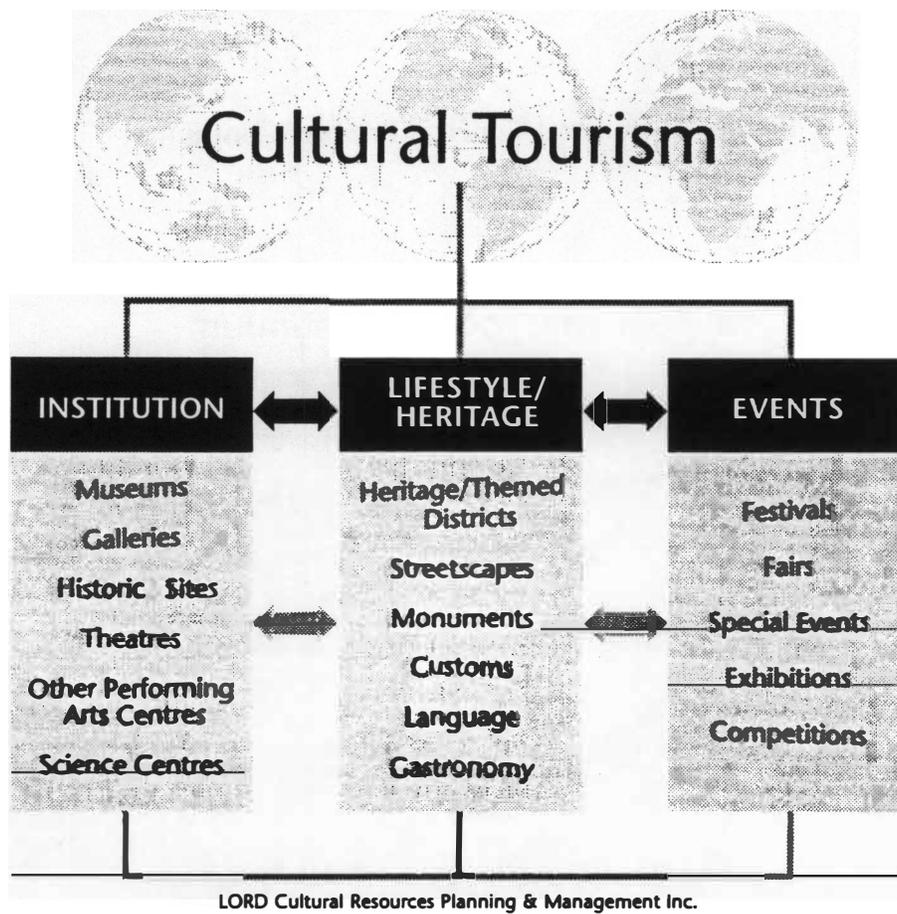
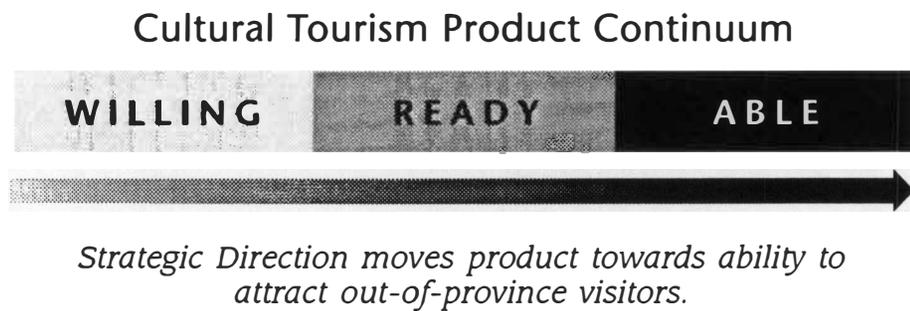
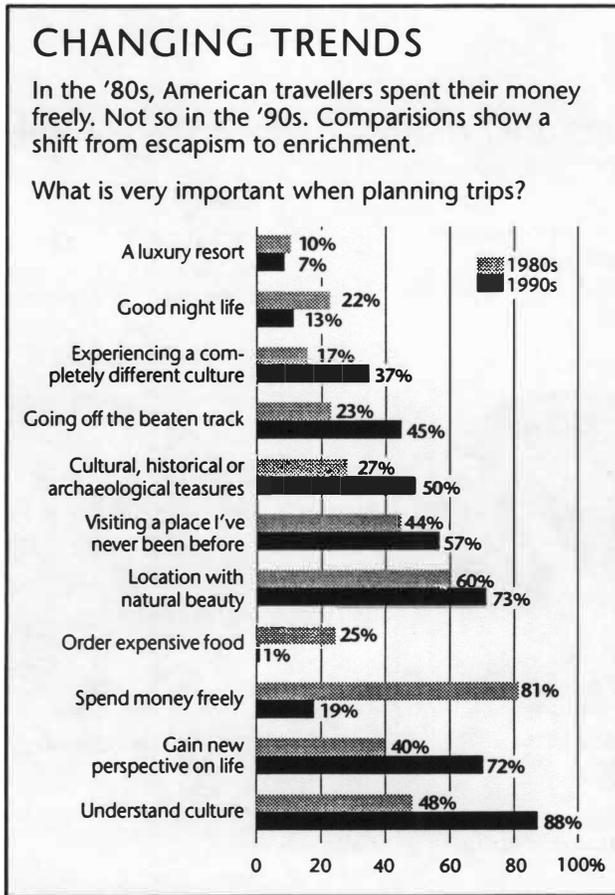


Figure 3: Cultural Tourism Product Continuum



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Figure 4: Changing Trends



Source: Lou Harris Poll for Travel & Leisure Magazine

Figure 5: Degree of Consumer Motivation for Cultural Tourism

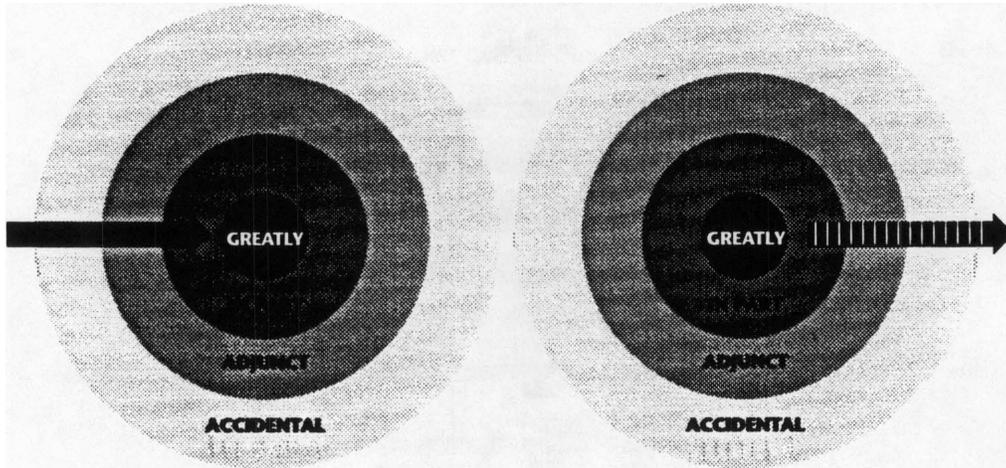
Degree of consumer motivation for cultural tourism



Promotion increases consumer motivation to participate in cultural activities.



Packaging increases consumer exposure to cultural activities thereby appealing to a larger market.



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Figure 6: Cultural Tourism Destinations

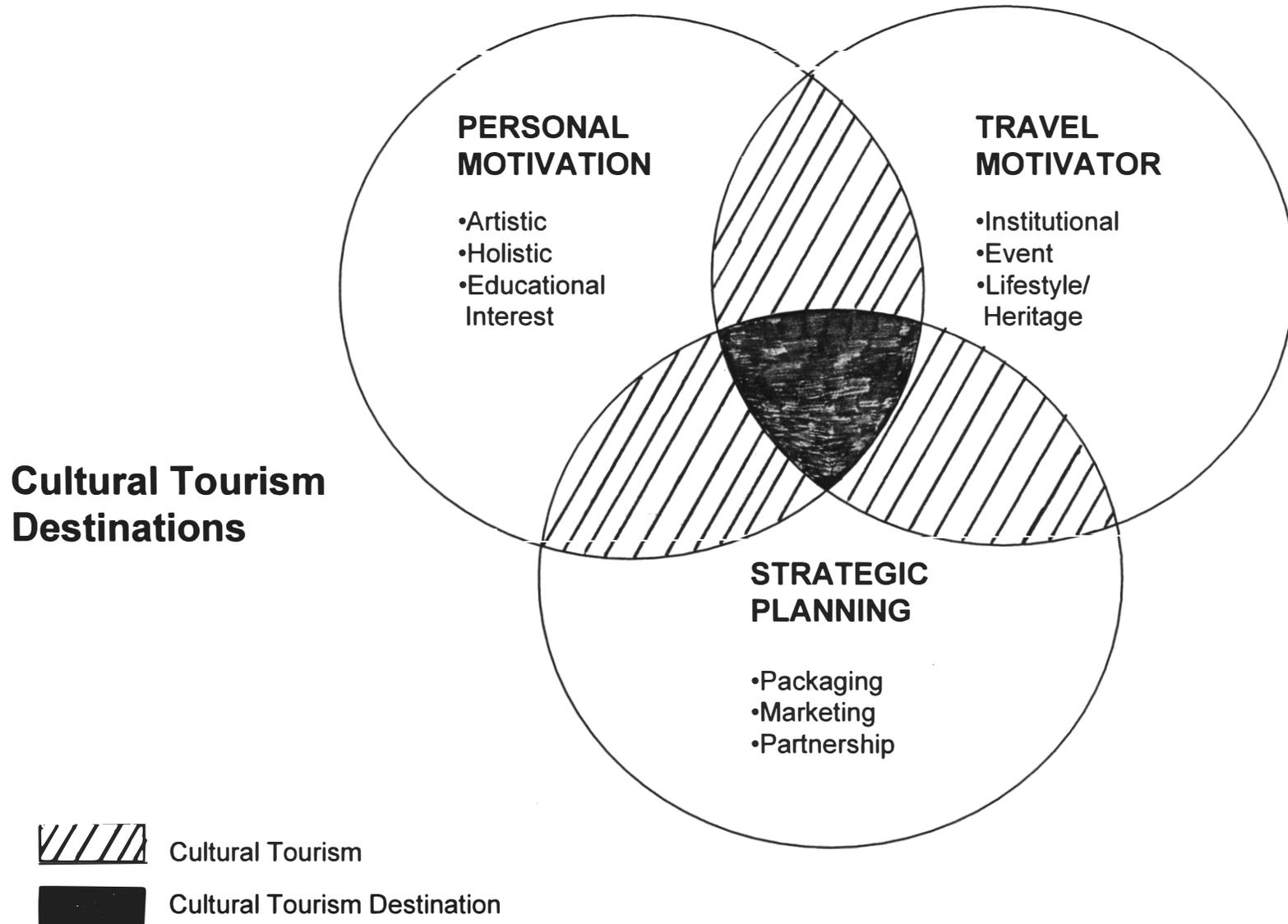


Figure 7: Cultural Tourism in the Context of Destination Marketing

