
Ontario Cultural and Heritage Tourism Product Research Paper

February 2009

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Introduction

Ontario has experienced a decline in tourism, particularly travelers from the US. The Ministry of Tourism needs to take the province in a new direction in order to promote growth outside of the domestic Ontario market, representing new sources of revenue. Cultural tourism is known to be especially attractive to long-haul travelers. This cultural and heritage tourism research paper is one of thirteen research papers commissioned to provide guidance to the Ontario Tourism Competitiveness Study.

This study creates a framework for identifying, evaluating, promoting and supporting high yield cultural tourism opportunities in the province from the consumer perspective. Thus there is an emphasis on understanding the needs of the 21st-Century cultural tourist. To this purpose, the consultants have completed the following work elements:

- Met with the client group on two occasions in person and twice by teleconference.
- Reviewed publicly available background documents including web-based research.
- Engaged the expertise of Lord Cultural Resources world-wide network of offices to obtain information on successful cultural tourism attractions and best practices.
- Applied the more than 27 years of international experience of Lord Cultural Resources in cultural planning and cultural tourism.
- Prepared a draft report, two mid-point discussion papers, a final report, including executive summary.

To date, participating in a cultural activity has featured prominently in the ‘things to see and do’ for visitors to Ontario and many of the province’s key attractors are cultural experiences. **The objective of this research paper on cultural tourism is to build on existing successes as well as to find innovative and robust ways to attract a greater number of cultural tourists to Ontario.** This requires understanding what is currently being offered and to whom, and thinking ‘out of the box’ for solutions that will answer the needs of present and future visitors through enhancing existing experiences, and, where and if needed, creating new ones.

Through the Competitiveness Study process, the Ministry is looking for a framework that will support “Big Ideas” that will re-energize cultural tourism in Ontario; if need be – creating a new vision for cultural tourism.

Identifying this framework starts with understanding the needs of the cultural tourist of today and tomorrow, who we have termed – the 21st Century Cultural Traveler:

- How does this traveler experience the world differently than in previous generations?
- What are his/her needs when it comes to cultural experiences when traveling?

What cultural attractions will become the demand generators of Ontario’s future?
This study seeks to answer these questions within the context of:

- The Ministry of Tourism’s commitment to ‘think big, bold and outside the box’¹.
- Ontario’s Innovation Agenda which aims to ‘build on the strength of Ontario’s creative environment, diverse culture, highly skilled workforce, world-class educational system and internationally recognized research community’ to become one of the ‘winning economies of the 21st Century.’²
- Our experience and knowledge gained from working with many of the top cultural tourism attractions in the world.

The strategic recommendations in this paper have been developed to provide guidance to the Province of Ontario in how to invest in developing and positioning Ontario as a significant cultural tourism destination on the world stage.

¹ The Honourable Peter Fonseca, Minister of Tourism in ‘Mapping Ontario’s Tourism Future: A Starting Point for Discussion’, Ontario Tourism Competitiveness Study, Ministry of Tourism, Spring 2008.

² “SEIZING GLOBAL OPPORTUNITIES: Ontario’s Innovation Agenda, www.ontario.ca/innovation’, Ministry of Research and Innovation.

Cultural Tourism: Current Context and Trends

In this section, Lord Cultural Resources identifies the current context and trends for cultural tourism in the 21st century, and analyzes how these trends are reflected in Ontario's cultural tourism experience.

This section reviews trends in cultural tourism, and the characteristics of 'the 21st Century Cultural Traveler'. Globalization and the Internet have so impacted the motivations and methods of cultural tourism that the needs and expectations of the "cultural tourist" must be redefined.

Best Practice examples are provided that demonstrate how these trends are manifested in highly rated cultural attractions worldwide.

The cultural tourism landscape in Ontario has been evaluated. Who are our visitors? Where are they going? What cultural experiences are on offer? How is Ontario's cultural product viewed by its visitors?

Finally, the gaps and opportunities in Ontario's cultural tourism product vis-a-vis current trends in cultural tourism have been identified.

Cultural Tourism: An Overview

Cultural tourism has existed since the days of Herodotus in ancient Greece, who, in about 440 BCE listed the seven 'Miracles' of the Ancient World. In the 19th century 'culture' was a major reason for travel as it was considered a necessary part of the education for the upwardly mobile. It was in the latter half of the 20th Century, however, that cultural tourism worldwide saw its biggest boom.

With cultural tourism, tourism and culture come together to meet the particular needs and interests of travelers whose main motivation for travel are experiences in the performing arts; visual arts and crafts; museums and cultural centres; historic sites and interpretive centres; cultural industries and cultural events.

With the rapid rise in levels of educational attainment among populations in both the developed and developing world, the development of tourism infrastructure prompted by the emergence and growth of mass tourism in the late 20th Century and into the 21st Century; and a sustained period of peace, cultural tourism has moved into an era of unprecedented growth.

More and more people globally, and in Canada and Ontario, are including cultural attractions as part of their activities while traveling. Over half (53.5%) of all Americans who participated in a pleasure trip in 2004 and 2005 visited historical sites, museums and art galleries³.

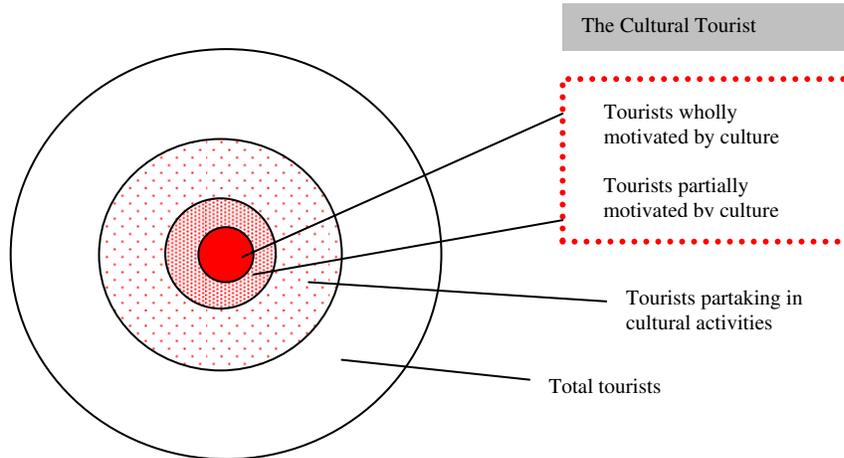
More importantly, the percentage of people who travel specifically for the purpose of arts and culture - i.e., where arts and culture are demand generators - is also increasing. In 2004, just under one-fifth (17.6%) of all Americans and Canadians surveyed in the Travel Activities and Motivations Survey (TAMS) 2006 reported that culture and entertainment activities were their main reason for a trip⁴.

Those who travel wholly or in part for the purpose of arts and culture (as their main motivator) are the key market segment to attract and are the focus of this study. Satisfying the needs of these 'cultural tourists' will have the effect of increasing the overall tourism numbers traveling to Ontario. This segment is represented in the diagram below, and is estimated to amount to 25% of all tourists to Ontario, a percentage which will grow in the knowledge economy of the future.

³ TAMS 2006: U.S. Culture and Entertainment Activities While on Trips: An Overview p. 36.

⁴ TAMS 2006, U.S. Culture and Entertainment Activities While on Trips: An Overview p. 37.

Diagram 1: Cultural Tourists vs Mass Tourists to Ontario

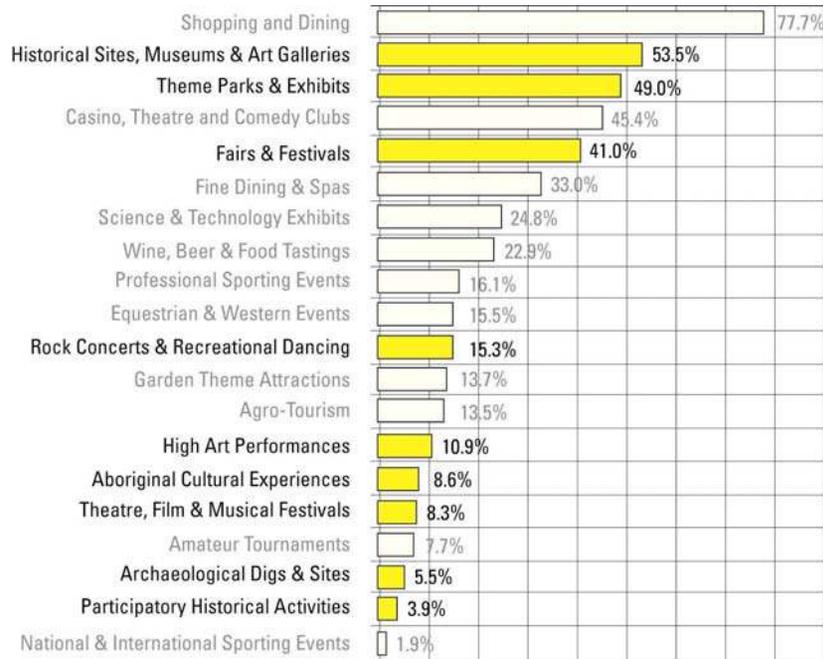


***NB While not defined as cultural tourists in this report, there is also tremendous potential in the other approximately 27% of tourists who report partaking in a cultural experience while here, even if culture is not the motivation for their trip. These tourists are ripe to be converted into cultural tourists for their next trip by ensuring that their cultural experience in Ontario is so positive that it offers a compelling reason to come back again.*

Source: Lord Cultural Resources assessment of TAMS 2006 data, January 2009

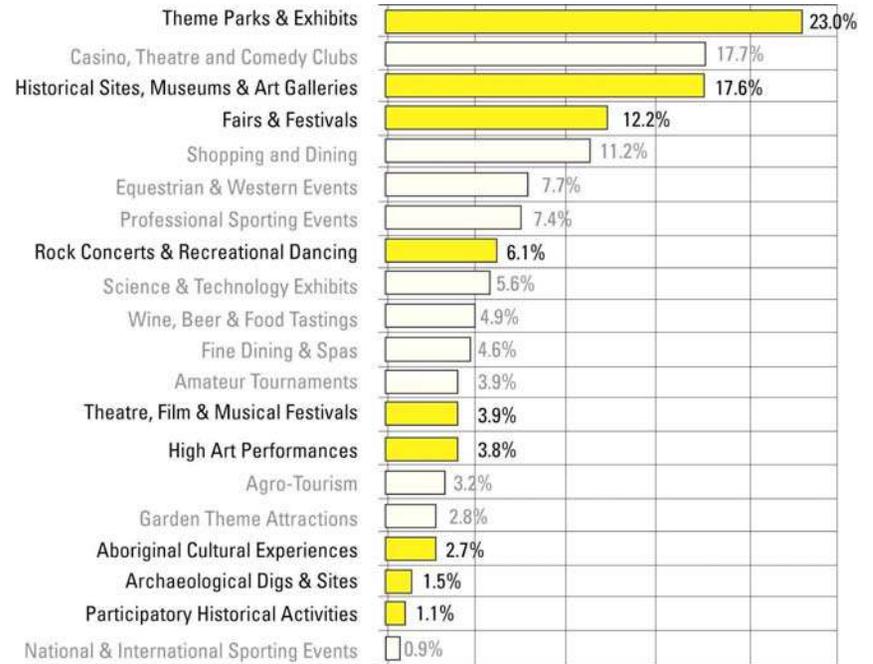
Cultural activities pursued while traveling are represented by the two graphs below, taken from the TAMS 2006 survey, which evaluated the travel behaviour of the US market while on trips of one or more nights. The diagram on the left indicates that over half of the US travel market visits a historical site, museum and/or art gallery. These are more visited than theme parks, casinos or national and international sporting events. The diagram on the right identifies those culture tourists who travel specifically for the purpose of various culture and entertainment activities. In this instance, those who visit a destination for the purpose of historical sites, museums and art galleries (i.e., the cultural tourist) are slightly less motivated than those who visit theme parks and casinos, but are still a considerable visitor segment.

Diagram 2: Percent Participating in each Culture and Entertainment Activity while on a trip



Source: "U.S. Travel Market: Culture and Entertainment Activities While on Trips of One or More Nights, Overview Report" (based on TAMS 2006) September 22, 2007. Prepared by Lang Research Inc., p. 36.

Diagram 3: Percent who report Culture & Entertainment activity type was a main reason for a trip



Source: "U.S. Travel Market: Culture and Entertainment Activities While on Trips of One or More Nights, Overview Report" (based on TAMS 2006) September 22, 2007. Prepared by Lang Research Inc., p. 37.

The Role of Culture in Tourism: Destination Enhancer or Destination Motivator

Culture plays a dual role in tourism. On the one hand, it can be seen as ‘part of the mix’ of what makes a particular destination appealing to a prospective tourist. It can be referred to as playing a ‘destination enhancer’ function - and this aspect of culture in tourism is the focus of a range of studies and strategies adopted largely by destination marketers, local government and chambers of commerce, that relate to the value of ‘place-making’. **It has been proven globally that arts, culture and heritage are key ‘destination enhancers’** - i.e., they play a significant role in determining the overall desirability of a particular destination, whether or not these are cited specifically as reasons for travel.

In his book, *Urban Tourism: The Visitor Economy and the Growth of Large Cities*, Christopher Law sites three categories of reasons for why urban tourists are attracted to their destination cities. The first category, “Primary elements” includes **cultural facilities**, physical characteristics, sports facilities, and socio-cultural features like “liveliness of the place”; “Secondary Elements” includes accommodation, shopping, and markets; and “Additional Elements” includes accessibility, amenities like parking, and tourist information.⁵

On the other hand, more than being just a feature that enhances a particular destination, **culture can be the main reason to travel -- without which visitors would not travel to a particular destination. In this instance, culture becomes the destination motivator and we view this as cultural tourism.** Cultural tourists tend to be motivated by ‘learning something new’, ‘hoping to enrich their lives through their travel experience’s and ‘education and enrichment’.⁶

Cultural tourists are considered to be those where experiencing arts, culture and heritage is the destination motivator.

⁵ Law, Christopher, *Urban Tourism: The Visitor Economy and the Growth of Large Cities*, Continuum, New York, 2002.

⁶ “The Artful Traveler: Cultural Tourism,” John A. Walker College of Business, Appalachian State University, 2005.

Profile of the Cultural Tourist

The following provides a snapshot of the 12 main characteristics of the cultural tourist.

The Cultural Tourist...

- **Is highly motivated by the benefits of cultural travel:** Benefits of cultural travel include learning, self-improvement, status, all which mitigate other deterring factors such as costs of travel, and even security. Bilbao is an excellent example. It has attracted between 800,000 and 1 million cultural visitors every year since it opened a decade ago – despite currency fluctuations, the cost of getting to Bilbao and even terrorist incidents.
- **Is looking for a “Meaningful Personal Experience”:** Tourists want to be engaged and to have experiences of personal identification that are meaningful to them and within their frames of reference. Cultural experiences are a backdrop or catalyst for individual self-development and memories, which refer more to the tourist’s personal history than to that of the site. The increase in the kinds of tourism on offer (e.g., volunteer tourism, culinary tourism, golf tourism) is a testament to the degree to which tourists are seeking experiences that engage their specific concerns and interests.
- **Has a higher propensity to ‘explore’:** The cultural tourist is generally an overnight tourist who will likely seek a range of experiences at his/her destination of choice. In the 1990s, it was said that “cultural tourists stayed longer” in a place, but in the 21st Century, cultural tourists are short of time and, based on our experience, they “explore more” in a place.
- **Seeks a total ‘experience’ that includes cultural landscapes, cityscapes and townscapes:** This visitor views heritage resources broadly and seeks to connect with the meaning of the landscape or town in terms of cultural values. This is different from the older concept of the “beauty spot” or “photo-op” in that the emphasis is on meaning and not just appearance. Cultural landscapes are inscribed with meaning - geographic (how the land formed), economic (how it is used) and historic (what happened there) for both local residents and tourists.
- **Is motivated by high impact ‘time specific’ cultural events, such as blockbusters and festivals:** Special events (blockbusters, art fairs, festivals) create a sense of urgency and an excitement that capture the attention of people who would not normally attend. For example, people will pay higher admission charges to see a blockbuster exhibition that will give them a ‘once-in-a-lifetime’ experience. When the Barnes exhibit was hosted at the Art Gallery of Ontario, 7 out of 10 of the out-of-town visitors to the Barnes Exhibit from Ontario, Quebec and the US made the trip specifically to see the exhibit. Of these ‘Barnesians’, more than 8 in 10 said they usually take one out of town trip a year to attend a cultural event and on average they take between 5 and 6 such trips a year.⁷ Similarly, art fairs like Art Basel and Art Basel Miami attracting 60,000⁸ and 40,000⁹ art-aficionados respectively over four days, are a strong indication of the power of events in attracting cultural tourists.

⁷ “Blockbusters & The Cultural Visitor: A Special Analysis of Out-of-Town Visitors to the Barnes Exhibit at the Art Gallery of Ontario”, Prepared for the Department of Heritage by Judy Rogers, Research Resolutions, November 1996

⁸ “Art 39 Basel:El Dorado of the International Art World” Media Information Sheet, p. 1.
http://www.artbasel.com/global/show_document.asp?id=aaaaaaaaaardfm

- **Is concerned about environmental, economic and cultural sustainability:** Increasing advocacy is placed on policy, heritage planners and developers to manage the natural and cultural environments that could be under enormous pressures from overuse by tourists. The needs of local populations and the protection of cultural identities are important in developing sustainable tourism and have become increasingly important as more and more countries turn to tourism as an economic development strategy. Tourists are increasingly sensitive to the impact their presence may have on a local physical and cultural 'ecosystem'.
- **Is increasingly 'worldly':** The era of globalization is characterized by a fast-paced exchange of information from all corners of the world, including money, capital, ideas, images, information, people, objects and technologies. Cultural tourists do not generally 'head off into the unknown' as a blank slate, but rather bring with them a bank of cultural knowledge that informs the way in which they choose and interact with their host destination.
- **Takes frequent short trips (getaway holidays):** Tourists on short-break holidays tend to spend more money on these trips, especially for extras and luxuries. In European cities, where there is competition for the cultural tourist among the leading cities of Paris, London, Amsterdam, Barcelona, Rome, Venice, Dublin, Brussels, Berlin, Prague and Budapest, the 'short urban stay' tourist segment is being aggressively courted. For example, on one website there is a special segment called 'Weekend and Expos' which allows travelers to put together a customized short stay package that includes a city, an exhibit, and a hotel experience¹⁰.
- **Uses the Internet to identify where and how to travel:** 69.0% of the US market surveyed in TAMS (2006) used the Internet to plan their trips (20.1%) or to both plan and purchase travel (48.9%). Moreover, those who have a greater tendency to participate in cultural and entertainment activities while traveling are more likely to use the internet for these purposes (82%), as opposed to those who do not participate in cultural and entertainment activities (37.4%)¹¹.
- **Can be of any age:** Although those who visit cultural attractions in Europe tend to be older (50+), those who participate in city-based cultural tourism activities in European destinations are between 20 and 29 years old¹². In North America, cultural tourists tend to be represented by the baby boomers (those over 45 years) although there is also a significant number of cultural tourists in the 20-34, 'young professionals', age bracket.
- **Has a higher level of education attainment than others tourists:** Most studies of cultural tourists worldwide indicate that those who travel for the purpose of arts and culture tend to be more educated than mass tourists. These tourists tend to have university or college degrees, or higher degrees.
- **Spends more money at their destination:** Our analysis indicates that this is consistent with the fact that cultural tourists tend to be overnight tourists who explore and who spend money on accommodation, meals, shopping while traveling.

⁹ "Art Basel Miami Beach: The most prestigious Art Show of the Americas", Media Information Sheet, p. 1.

http://www.artbaselmiami.com/global/show_document.asp?id=aaaaaaaaaarnqi

¹⁰ <http://www.fnacvoyages.com>.

¹¹ TAMS 2006: U.S. Culture and Entertainment Activities While on Trips: An Overview p. 2.

¹² 'City Tourism & Culture: the European Experience' commissioned by the World Tourism Organisation & European Travel Commission, LAGroup Leisure & Arts Consulting and & Interarts (2004). These statistics are also reported in the ATLAS 2007 report which indicates the 20-29 year old group as the single biggest demographic of cultural tourists. The North American experience tends to view the cultural tourist as a 'baby boomer' with TAMS reporting that the average age of American travelers is 45.6 years.

Cultural Tourism in the 21st Century – 5 Key Trends

In addition to the above characteristics which emerged in the latter decade of the last century, there are 5 key trends we believe will come to characterize cultural tourism in the 21st century.

1 New Markets:

The increase in the GDP of dozens of emerging economies, the rise in disposable income of their populations and their higher propensity to travel (for status, interest, fulfilment, family and work) is having a tremendous impact on the tourism landscape. For example, countries everywhere are chasing the fast-growing Chinese and Indian outbound markets.

For Ontario, overseas visitors from emerging markets are growing steadily. Visitors from Mexico have surpassed those from Germany and Japan, and Indian visitors have surpassed those from France¹³. Travelers from these segments to Ontario tend to fit the profile of the cultural tourist in that they tend to be more educated, have a higher income and are seeking a cultural experience to a much higher degree than the average tourist. While Mexican travelers tend to be largely leisure tourists¹⁴, Indian travelers are more often motivated by the category of ‘Visiting Friends and Relatives’ — as many as 2.8 million (or 16%) of the total global Indian long-haul travel market (17.8 million) has close friends or relatives living in Canada¹⁵. In Ontario, people of South Asian origin are the largest visible minority group, of whom 71.6% are foreign-born people who came to Canada as immigrants.¹⁶

Understanding the travel motivations and desires of new emerging tourism markets to Ontario will enable the development of the appropriate cultural experiences. This will help to reduce Ontario’s reliance on our traditional cultural tourism markets (US, UK and Germany), which are among the hardest hit by the current world economic crisis. At the same time, it is important not to overlook those who may be coming ostensibly to ‘visit friends and relatives’ (VFR). The VFR tourist has the potential to become a powerful ambassador for Ontario.

¹³ Tourism Performance, Ministry of Tourism, September 2008.

¹⁴ “From Mexico to Canada!” Tourism Magazine On-line, Volume 004, Issue 04, April 2007.
<http://www.corporate.canada.travel/corp/media/app/en/ca/magazine/pastIssues.do>

¹⁵ India Consumer and Travel Trade, March 2007, Insignia, Key Findings, p. 4.

¹⁶ Canada’s Ethnocultural Mosaic, 2006 Census: Provinces and Territories; Ontario: Home to more than half of Canada’s visible minority population, StatsCanada,
<http://www12.statscan.ca/English/census06/analysis/ethnicorigin/Ontario.cfm>

2 Creative Economy:

In the industrial era which created wealth through the production of products, cultural tourism (the “grand tour”) was a commodity to be consumed. In the knowledge age in which wealth is created through a service oriented creative economy, cultural tourism is an active, participatory “experience”.

With the emergence and growth of the knowledge economy and its drivers – the ‘creative class’, the distinction between recreation and work has become blurred.¹⁷ The ‘creative class’ is now estimated to represent 30% of the workforce in most urban centres in North America and as such, is a significant demographic¹⁸. Travel – and especially cultural travel with its strong learning component – has become part of the personal toolkit for professional development. Our assessment is that while traditional travel motivations like relaxation and escapism will persist; the creative worker is equally or more concerned about using travel as a means of improving his or her intellectual competencies.

For the ‘creative class tourist’, travel is justified in the way that it contributes to the tourists’ personal bank of knowledge and skills, which, in turn, increase their competitiveness in the creative economy. Travel experiences for these tourists therefore must provide opportunities for personal and professional development.

¹⁷In the ATLAS 2007 Survey, 30% of those surveyed had an occupation connected to culture (ascribed to the growth of cultural and creative professions (or at least an expanded definition of these professions) and the tendency for those in such professions to engage in cultural tourism.

¹⁸Cities and the Creative Class, Florida R., New York: London: Routledge, 2005.

3 Agency and Participation:

Agency, defined as “the state of being in action or of exerting power” and exemplified in the credo ‘the world doesn’t happen to me, I happen to the world’ is a hallmark of the Generation ‘Y’s’ - giving rise to the term the ‘prosumer’ a term coined by futurologist Alvin Toffler¹⁹. The ‘prosumer’ is both the producer and consumer – that is, he/she is active in creating the product of choice. Nowhere is this more evident than in the explosion of social media, shorthanded as Web 2.0. With the rise in interactivity on the internet, individuals now have the tools to easily organize others, share ideas, present solutions, create community, plan travel – in effect, act without waiting for someone else to facilitate.

For a new generation of tourists, being able to actively choose and participate in their own experience is a given and a reflection of their general experience in the world. A cultural experience must provide opportunities for choice and participation.

¹⁹ Toffler, Alvin, *The Third Wave*, Bantam Books USA, 1980.

4 Diversity of Interests:

As markets become increasingly segmented, cultural tourists will be able to find experiences that speak directly to their particular interests. Prompted by demand, marketers and tour operators are catering to the gay tourist, the learning tourist, the volunteer tourist, the adventure tourist, the golf tourist, the culinary tourist and so on.

In order to provide the maximum visitors with maximum 'reasons to visit', and in keeping with the trends above, Ontario's cultural destinations will need to provide a range of experiences between 'consumption' and 'participation'. A destination must be able to provide a continuum of experiences – from passive to active, including hybrid models that allow the tourist to design and mould her/his experience towards a unique definition of cultural tourism.

5 Competition on Excellence:

Despite slower general tourism growth seen recently due to lagging confidence and general economic conditions, based on our review, it is expected that cultural tourism will continue to grow as overall levels of post-secondary education increase and as the knowledge economy continues to grow. As the market of those traveling for cultural experiences (demand) expands, so will the corresponding 'products' (supply), increasing competition between products, destinations and experiences.

In the past, Ontario has been successful as a cultural destination because it offered "very good" cultural experiences at a relatively low cost. Ontario benefited from exchange rates (a low dollar) and value for money in ticket prices and admission fees.

While recent statistics indicate that cultural tourists from the long-haul US markets are less affected by economic changes than the sightseeing tourist from the Border States²⁰, Ontario nevertheless faces a lot of competition to attract these cultural tourists. During the past 10 years many US and other competitor cultural destinations received significant capital investment and marketing monies.

In the current climate of fluctuating currency and oil prices, Ontario must compete on excellence. Fortunately a number of our main cultural tourism products have had major capital investment and have the potential to be truly competitive in world terms. However, the mindset of competition on "cost" needs to be replaced by the mindset of competing on excellence. This requires re-imagining Ontario's cultural tourism products and investing in their programmes and staff.

With a global menu to choose from, cultural tourists will flock to those experiences that are of high quality and distinctiveness and that provide "value for time". As a result, Ontario's cultural experiences must be of world-class standard in order to compete.

²⁰ Although Ontario saw a 19.9% decrease in cross-border tourists in July and August 2008, only 3.1% of these were from over-night tourists. (Ministry of Tourism, Tourism Performance released in September 2008).

International Best Practice

A broad scan of 22 successful destinations reveals which cultural experiences internationally are achieving excellence in the ways in which they are developing and positioning themselves to the growing global middle class in an increasingly competitive cultural tourism environment.

Many of these Best Practice examples indicate how festivals, events and institutions are successfully supplementing their 'consumptive' experience with a creative one in order to address the needs of the 'prosumer'. Other attractions have been developed with a 'creative' offering at their core.

The Power of Iconic Buildings

In the late 20th century, iconic cultural buildings designed by 'star-architects' made an indelible mark on the cultural landscape and became tourism magnets. Many of these buildings are credited with widespread urban revitalization in previously depressed locations and have created a sense of place and pride among local communities. Most of them have had significant and sustained cultural tourist destinations which benefit their host communities.

Guggenheim Museum, Bilbao, Spain²¹

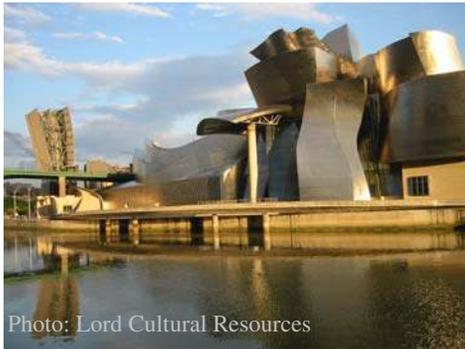


Photo: Lord Cultural Resources

“The Bilbao effect” is synonymous with cultural tourism in the 21st century. The term appears on the Internet 13,200 times. There are 141,000 entries for Guggenheim Museum Bilbao – but a remarkable 40 million entries for Bilbao – a city that was all but unknown prior to the 1997 opening of the Museum designed by Frank Gehry. In the past 10 years the Museum has attracted between 850,000 and 1 million visitors per year, with 90% of them being tourists. This museum has an outstanding programme of blockbuster exhibitions, which typically get higher attendance than

they do in larger cities like London and New York. On a per capita basis the Bilbao Guggenheim gets 10 times the attendance of the Guggenheim in New York! It has been noted that the museum has paid for itself through increased tax revenues and has sparked major urban redevelopment in hotels, more museums, a concert hall and convention centre.

²¹ Information on the Guggenheim museum is based on the knowledge and experience of the consultants, as well as from www.guggenheim.org

Centre Pompidou, Paris, France²²



Photo: Lord Cultural Resources

Known for its iconic architecture and superb exhibitions and collections, the Centre Pompidou is considered to be the first of the iconic cultural buildings to re-invent a derelict area of a major city. Designed by Renzo Piano and Richard Rogers, the Centre Pompidou opened in 1977 and is located in the historical centre of Paris. It attracts 18,000 visitors a day and 6.6 million annually. Although a museum by definition, the Centre Pompidou functions as a 'cultural agora' attracting 1.6 million visitors to its exhibitions; 102, 764 visitors to 835 movies; 22,000 visitors to concerts, shows, lectures and discussions; and 1.5 million visitors to its library – all annually. As well, the piazza adjacent to the Centre Pompidou is a destination where people meet, snack, play music and attend performances. The first of each month is free for all visitors, but the Centre Pompidou also always offers free admission to exhibitions for children under 18, teachers, disabled people and the unemployed. As well, it provides the general public with access to its Forum, libraries, Atelier Brancusi (Brancusi Workshop) and wireless Internet.

The Tate Modern, London, UK



Photo: Lord Cultural Resources

Tate Modern is one in a family of four Tate galleries, which displays selections from the Tate Collection (the other three galleries being Tate Britain, Tate Liverpool and Tate St. Ives). Tate Modern opened in 2000 and occupied a disused power station in the heart of London. It displays the national collection of international modern art, including modern British art since 1900. The Tate Modern programmes include many successful events and screenings. *UBS Openings Live* this year included the UK premier of Alvin Curran's *Maritime Rites*: a major performance on the banks of the river Thames involving the LSO and the bells of St Paul's Cathedral. Successful events in the Film programme included *Paradise Now* -- a major series devoted to French avant-garde cinema.

The Tate Modern's visitors²³ represent 58% from the UK and 42% from overseas. Sixty-eight percent of visitors are repeat visitors. The largest visitor segment is 17-34 years old.

²² Information on the Centre Pompidou is based on the knowledge and experience of the consultants, as well as from www.centrepompidou.fr

²³ Tate Audience Research 2007, Ipsos MORI, 2006, <http://www.tate.org.uk/about/marketresearch/>

Sydney Opera House, Sydney, Australia

The Sydney Opera House was inscribed in the World Heritage List in June 2007. Unesco describes the “Sydney Opera House as a great architectural work of the 20th century. It represents multiple strands of creativity, both in architectural form and structural design, a great urban sculpture carefully set in a remarkable waterscape and a world famous iconic building”.²⁴

The Sydney Opera House is operated and maintained for the Government of New South Wales by the Sydney Opera House Trust, which is constituted as a body corporate under the Sydney Opera House Trust Act, 1961²⁵

KEY OBSERVATIONS:

The 2008 openings of the ROM’s Michael Lee Chin Crystal designed by star architect Daniel Libeskind and the renovation of the Art Gallery of Ontario designed by Frank Gehry, as well as the much celebrated Sharp Centre at the Ontario College of Art and Design by Will Alsop, indicates that Ontario is embracing the power of the iconic building to create landmarks, attract visitors and catalyze development. However, each of these superb projects is an addition to an existing building and not – as in the case of Bilbao, Pompidou, Tate and Sydney Opera House - a major stand-alone building. Thus, the Toronto projects have the quality of iconic buildings but lack the distinction that scale and setting can provide.

²⁴ UNESCO website, world heritage sites: <http://whc.unesco.org/en/list/166>

²⁵ <http://www.sydneyoperahouse.com/homepage.aspx>

The Attraction of Global Cultural Brand Signifiers

Art Biennales²⁶

There are over 160 Art Biennale and Triennales worldwide that take place on six continents. The most well known Art Biennale is probably the Venice Biennale, which attracts over 300,000 visitors to its multi-disciplinary event in contemporary arts. Other well-known Biennales include:

- **Liverpool Biennale**, *Liverpool, UK*- UK's largest festival of contemporary visual art. The International exhibition has commissioned well over 100 new works, many for the streets and public spaces of Liverpool, by established contemporary artists from around the world.
- **Bienal de Sao Paulo**, *Sao Paulo, Brazil* which is in its 57th year and involves 42 artists from 22 countries.
- **Documenta**, *Kassel, Germany* which attracted 754,301 paying guests in 2008, including 4,390 professionals and 15,537 journalists from 52 countries. This corresponds to an increase in numbers without parallel in recent Documenta history, with 16% paying visitors (100,000 people) more than at Documenta11.
- In Canada, the **Montreal Biennial** has attracted approximately 500,000 people to see and appreciate the work of some 800 artists, since 1984.

KEY OBSERVATIONS:

A time-specific, festival event that features high quality 'product' (art, music, photography) that attracts the top echelon of professionals and that generates substantial media interest is a strong strategy around which to build longer-term cultural experiences. Adjacent experiences are clustered around the core event, building on the reputation of the city as a 'cultural hotspot' and encouraging visitors to prolong their stay and/or come back again.

The International Contemporary Art Fair, ARCO, *Madrid, Spain*²⁷

Art fairs are similar to Biennales in their power to attract large numbers of tourists. An example of a successful art fair is the International Contemporary Art Fair in Madrid, Spain. ARCO will be celebrating its twenty-eight edition in 2009 with an exhibitions programme that showcases the best of today's world art scene. The presence of high-profile galleries from 35 countries, with a combined roster of nearly 3,000 artists from around the globe, and the contribution of a wide-ranging team of curators focusing on new areas of endeavour and major production centre, all give promise of an exceptional show – one extraordinarily attractive to the many collectors and art professionals from every part of the world who come to Madrid for the event. In 2008, it received 300,000 visitors (general visitors, art dealers, art critics, collectors) between the 13th and 18th of February, as well as 295 Gallery participants.

²⁶ www.biennial.com; bienalsaopaulo.globo.com; www.documenta12.de; www.ciac.ca

²⁷ www.ifema.es

ARCO pro-actively seeks to identify top curators and artists who are selected to take part in the festival as well as in the expert international forum which is a series of conferences for curators and art dealers and is regarded as one of the highest quality forums as a result of the people it assembles. ARCO and the media attention it generates is one of the biggest contributors to Madrid's growing reputation as a 'design city'- a reputation it is cultivating for the tourism market. For international galleries attending the fair this means one to two preparatory trips during the year. The pre-Arco trips contribute to growing Madrid's artistic and cultural reputation. When they come they do additional business in preparation for the fair.

KEY OBSERVATIONS:

Festivals and Special Events operate along the same principles as Iconic Landmark buildings. That is, 'big names' and influencers are regarded as an indication of the quality of an event and as such are more likely to attract cultural tourists than those events (art fairs, blockbuster exhibitions, festivals) who do not have the right 'brand' associations.

The Distinctiveness of Unique Places

Cultural attractions excel when they achieve a level of distinction that motivates travelers to seek them out 'against all odds'. Many of the world's top cultural attractions mark a historical time and place that is unique (the Great Wall of China, the Taj Mahal, the pyramids of Ancient Egypt), others are of a scale not duplicated anywhere else in the world and others build on an unusual way of looking at the world, or promote distinctive features in their location – either natural or 'human-made'. Whatever their reasons for being distinct, these experiences rarely find a parallel anywhere else in the world.

Ellis Island Immigration Museum, *New York, USA*²⁸

The Ellis Island Immigration Museum was developed as part of a private sector effort to restore the Statue of Liberty and Ellis Island – a site that received millions of immigrants to the United States between 1892 – 1954. The Museum and the iconic Statue of Liberty mark a distinctive feature of the development of the United States – that of the Immigrant Experience in the actual place where most immigrants arrived.

The Museum was opened in 1990 and includes many of the restored rooms as they were during the height of immigrant processing. The Museum also includes theatres, libraries, an oral history recording studio, a children's orientation centre, the Ellis Island Living Theatre and exhibits that tell the story of 'The Peopling of America'. The Museum is currently being expanded to include facilities that will tell the story of immigration in the United States from 1954 until the present day.

The Ellis Island Immigration Museum has welcomed nearly 30 million visitors since it opened in 1990.

²⁸ www.ellisland.org

The Native American Cultural Center and Museum, *Oklahoma City, USA*²⁹

The Native American Cultural Center and Museum concept was the culmination of many years of discussion among members of Oklahoma's tribal communities and others to develop a major facility to tell the story of the tribes in Oklahoma, showcase Oklahoma Indian arts and culture, and strengthen the success of cultural tourism enterprises initiated by tribes throughout the state.

The museum also intends to feature a commercial component called the Arts & Crafts Market Place. It is intended to be a retail showcase for art by Oklahoma native artists. Additionally, a resort hotel and conference center are being planned to complement the museum, meant to attract both leisure and business travelers.

The Native America Cultural Center and Museum is distinctive both in the story it tells, as well as its institutional structure – as a partnership between Oklahoma's tribal communities, the private sector and government.

Funding for the museum is derived from both city and federal funds: \$63 million from city agencies and bonds and \$8.7 million from federal grants. The land is being donated by Oklahoma City.

The 2003 economic impact study by Applied Economics indicates that Oklahoma's economy will be positively impacted over the next 20 years by the American Indian Cultural Center. In the first 20 years of operation, direct visitor spending could generate \$71.1 million in local sales and hotel tax revenues, and \$69.5 million in state sales taxes. Additional indirect revenues would result in \$66.0 million in local sales and property taxes, and \$116.7 million in state sales and personal income taxes.

Vulcania, *Auvergne, France*

Vulcania is located in the Parc Naturel Régional des Volcans d'Auvergne (Regional Nature Park of the Volcanoes of Auvergne) about 15 kilometres from the centre of Clermont-Ferrand. Now Vulcania's challenge is to bring science alive with sensations and emotions, while at the same time preserving an educational aspect – an objective that considerably changes both the appearance and atmosphere of the site, with new combinations of fun and learning, emotion and understanding. Vulcania, in line with its educational objectives, therefore plays a major role in understanding these sometimes violent natural phenomena that govern our planet.

A livelier and more hands-on scenography makes emotion a part of the adventure offered to visitors. It becomes a formidable source of knowledge, offering the opportunity to share and understand the major challenges of the 21st century.

²⁹ The information here is based on the knowledge of Lord Cultural Resources knowledge/expertise.

Marfa, Texas, USA³⁰

Marfa, Texas is a small town in the mountainous Trans-Pecos region of Southwest Texas and a major tourist attraction in the region. In 1971, renowned minimalist artist Donald Judd moved to Marfa from New York City. He began permanently installing his art in two large hangars that he bought as well as some smaller buildings. He acquired an old decommissioned fort and began transforming the fort's buildings into art spaces in 1979. Judd's vision was to house large collections of individual artists' work on permanent display, as a sort of anti-museum. Since Judd's death in 1994, two foundations have been working to maintain his legacy: the Chinati Foundation and the Judd Foundation. Every year The Chinati Foundation holds an Open House event where artists, collectors, and enthusiasts come from around the world to visit Marfa's art. Since 1997 Open House has been co-sponsored by both foundations and attracts thousands of visitors from around the world. The Lannan foundation has also established a writers-in-residency program, a Marfa theater group has formed, and a multi-functional art space called Ballroom Marfa has begun to show art films, host musical performances and exhibit other art installations.

KEY OBSERVATIONS:

Identifying those features of a destination that are unique and supporting them through high quality interpretation, positioning and marketing is a strong strategy for developing competitive cultural attractions. Most 'unique' experiences are heritage experiences which position a destination historically distinctive. In other instances, however, distinctiveness can be developed as a new experience, as in Vulcania.

The Convenience of Clustering

Time-pressed tourists appreciate convenience. "Clustering" cultural entities creates a critical mass of attractions that justifies the time spent. Some of the world's most successful cultural tourist attractions are part of clusters – whether they be permanent cultural destinations or festivals and art fairs.

³⁰ www.marfacc.com



Photo: Lord Cultural Resources

Cité des Sciences et de l'Industrie Paris, La Villette, Paris.³¹

The Cité des Sciences et de l'Industrie Paris is a 55-hectare park (100 000 sq. M) located in Parc de la Villette, a working class area north of Paris. Built on the site of a disused and derelict slaughterhouse, the Cite des Science et de l'Industrie Paris receives 3 million visitors per year and 10,000 per day.

It is a destination for parents and children with a fantastic cultural offering that includes exhibitions, concerts, performances, indoor and outdoor cinema, a children's playground, restaurants and festivals. It also offers free access to Mediatheque; Carrefour numérique: workshops, exhibitions, lectures; Health Cité: free information and documentation, exhibitions; Job Cité: forums, meeting place for professionals and young people; La Fête de la science; pod-castable conferences; free scholar assistance; and Summer Festival in the Park.



The Distillery Historic District, Toronto, ON³²

The Distillery District in Toronto is an innovative private sector example of clustering. Opened in 2003, and developed by Cityscape Holdings Inc. and Dundee Realty Corporation, the Distillery is a pedestrian-only village dedicated to arts, culture and entertainment. Set on 13 acres in downtown Toronto, The Distillery is the largest and best preserved collection of Victorian Industrial architecture in North America. Aside from tours of the distillery and segway the area boasts about 15 art galleries and several performing arts theatres.

Along with arts it also offers a sophisticated shopping district with interesting boutiques for every kind of shopper as well as a variety of restaurants and cafes. Throughout the year, the Distillery hosts celebrations and special events such as the Distillery Jazz Festival, Partigras, Roots Music Festival, Antique Festival, art exhibitions and much more.

During the 1990s the empty distillery buildings became the number one film location in Canada and continue to be used for that purpose. Past productions include *Chicago*, *X-Men*, *Cinderella Man*, *Against The Ropes* and *The Hurricane*.

The Distillery District has ensured it is well positioned in the tourism media and is often sited as a 'neighbourhood to visit' in Toronto.

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³¹ www.villette.com; www.cite-sciences.fr

³² www.thedistillerydistrict.com

Museums Quartier, Vienna, Austria³³

In an effort to attract younger cultural tourists to Vienna, the city and federal government transformed the 18th Century Imperial stables into a cluster of cultural attractions including museums, art and architecture, a children’s museum and children’s theater, plus cafes and shops – all connected by a trendy piazza where young people can “hang out”. The result is a dynamic cultural cluster comprised of historic buildings and contemporary architecture that attracts highly educated audiences with an average age of 33 (young for Vienna, which is an aging city) with 25% of visitors from Austria outside Vienna, and 50% international tourists.

Rencontres International, Paris, France³⁴

The Rencontres International creates a space of discovery and analysis around new cinema and contemporary art, at a number of locations in Paris: the Centre Pompidou, the Jeu de Paume, the Paris-Villette, the Maison Européenne de la Photographie, the Beaux-arts de Paris, the Entrepôt, the Nouveau Latina and other partner places. The 10 day event in early December attracts 150 artists and filmmakers from all over the world who present work in film, video, installation, net art, and multimedia concerts. The event features film premieres, a video program, an exhibition and multimedia concerts.

Art Basel, Miami Beach, Florida, USA³⁵

Art Basel in Miami Beach is arguably the greatest example of a successful cultural destination since the Guggenheim in Bilbao. Art Basel at Miami Beach, held annually in December, is an extension of Art Basel Switzerland – one of the most prestigious art fairs worldwide. Since its inception in 2002, it has grown into a massive festival that includes more than 250 galleries from North America, Latin America, Europe, Asia and Africa, and showcasing 20th and 21st century artworks by over 2000 artists. The fair is complemented by young galleries, performance art, public art projects, street-side art exhibitions and video art. It has become the place to be seen for celebrities and international media, and reports approximately 40,000 visitors during its four-day run.

KEY OBSERVATIONS:

Positioning a city district as a cultural hub, with a range of programming options, is an important lesson in the power of collaboration, positioning, clustering and packaging. Attracted by a collective branding and marketing effort, the traveler can easily access a range of fulfilling experiences. The same holds true with an events-based strategy at various locations throughout the city – such as art fairs and festivals.

³³ This information is based on the knowledge of the consultants.

³⁴ www.rencontres-arles.com

³⁵ [Art 39 Basel: El Dorado of the International Art World. Media Information Sheet retrieved from www.artbasel.com](http://www.artbasel.com)

Creative Experiences

'Creativity Tourism' is recognized as:

'Tourism which offers visitors the opportunity to develop their creative potential through active participation in courses and learning experiences which are characteristic of the holiday destination where they are undertaken.'³⁶

'Creativity Tourism' is drawing large visitor numbers throughout the world. The following are a selection of the most successful festivals that deliver creative experiences to their visitors, thus expanding their 'reasons to visit', prolonging their stay and encouraging repeat visitation.

Festivals

South by South West: Music and Media Conference, *Austin, Texas*³⁷

The SXSW Music and Media Conference features a legendary festival showcasing more than 1,800 musical acts of all genres from around the globe on over eighty stages in downtown Austin. The Conference hosts a five-day adventure in the latest filmmaking trends and new technology, featuring distinguished speakers and mentors. The festival includes a film festival that explores all aspects of the art and the business of independent filmmaking. In addition, the SXSW Interactive Festival celebrates the creativity and passion behind new media technologies.

In 2007, 11,750 people participated in the music conference, 5,816 people participated in the film conference, and 6,483 people participated in the interactive conference. The Austin Visitor Bureau estimated that the economic benefit from all three conferences was \$43.5 million. The Visitor Bureau also reports 27,159 room nights booked in 45 local hotels during the festival.

Festival d'Arles, *Arles, France*³⁸



With over 50 exhibitions on show in splendid heritage venues all over Arles, the Rencontres have been contributing for forty years to the dissemination of the world's photographic legacy. Through uncovering new talent with its annual Discovery prize, the festival has established its role as a crucible for contemporary creativity. Bringing together leading practitioners and theoreticians from the world of photography, the Rencontres Colloquium takes an annual in-depth look at a specific subject in artistic, technical and

cultural politics terms.

³⁶ "Developing creativity in tourist experiences: A solution to the serial reproduction of culture?" Greg Richards, Julie Wilson in *Tourism Management* 27 (2006) 1209–1223, p. 1215. Creativity tourism is further discussion in Section 2: Strategic Framework.

³⁷ www.sxsw.com

³⁸ www.rencontres-arles.com

Opening week is accompanied by talks, discussions and guided tours, together with the chance for participating photographers and industry professionals to talk about their work and the issues raised by the images on show. Opening week is marked by a real party atmosphere: shows and projection sessions in the Théâtre Antique every evening and a photographic promenade through the streets for the Night of the Year. Open to amateurs and professionals alike, the workshops in April, July and August keep track of current creative concerns and technical innovation within the medium. Participants are given the opportunity to shape or enhance a personal approach while working with leading photographers in a remarkable setting.

The Festival received approximately 60,000 visitors in 2008 – its highest yet and an increase of 10% since 2007.

KEY OBSERVATIONS:

Providing a ‘creative’ experience alongside a more traditional ‘consumptive’ experience has become popular particularly with festivals and events. Organizers seek to build on the attention received by these events by extending them to multiple venues and offering more in depth participation. Many of the workshops, lectures, seminars offered provide both professional development and entertainment.

Creativity Destinations

There are an increasing number of permanent destinations that see offering opportunities for active, ‘creative’ participation as an important element of their mission. Most of these started as more traditional galleries or museums, but have expanded their programming to ensure that ‘participation’ is high on their agenda, others have been developed specifically for the purpose of collaboration and ‘creativity’.

Mass MoCA, North Adams, Massachusetts³⁹



Photo: Lord Cultural Resources

Since opening in 1999, MASS MoCA has become one of the world's premier centres for making and showing contemporary art. With annual attendance of 120,000, it ranks among the most visited institutions in the United States dedicated to new art. More than 80 major new works of art and more than 50 performances have been created through fabrication and rehearsal residencies in North Adams. MASS MoCA is dedicated to the creation and presentation of provocative visual and performing arts pieces, and of

works that blur conventional distinctions between artistic disciplines. It also functions as a laboratory for the contemporary arts, fostering experimentation by artists, encouraging collaborations among institutions and allowing visitors a behind-the-scenes look at the creative process.

³⁹ www.massmoca.org

To offset operating costs and stimulate job growth, MASS MoCA develops and leases space to a wide range of exciting business, including restaurants, publishing companies, law firms, photography studios and computer-generated special effects. The institution also collaborates with many partners across the county to strengthen regional tourism, improve infrastructure for small business development and attract and retain residents.

Mertola’s Archaeological Site, Mertola, Portugal

Since its creation in 1978, Mértola’s Archaeological Site has tried to develop a multi-disciplinary scientific investigation within the range of human and social sciences. Its work groups have also come to dedicate themselves to local history, historical heritage, artistic and cultural inheritance, museology and physical anthropology. Its main objective is to promote the survey, study and research into the heritage of the region of Mértola and to promote its conservation and safeguard, cooperating for this end with public or private entities in scientific actions or in cultural and social promotion. The main result has been the consolidation of a cultural tourism in a sustainable scale that has created a local development phenomenon, avoiding the desertion and depopulation of the interior of the region.

Le Laboratoire, Paris, France⁴⁰



Photo: Lord Cultural Resources

Founded by chemical engineer David A. Edwards, Le Laboratoire is an innovation space in downtown Paris – where artists and scientists perform collaborative experiments. The outcomes of these experiments are exhibited to the public in the form of contemporary art and design installations. Since its opening in October 2007, Laboratoire exhibitions have attracted broad international attention, with exhibition themes ranging from contemporary art, to industrial design, to humanitarian advocacy, to innovations in gastronomy.

Fabrica, Treviso, Italy⁴¹

Fabrica, Benetton’s communication research centre, was set up in 1994. It describes itself as “an applied creativity laboratory, a talent incubator, a studio of sorts in which young, modern artists come from all over the world to develop innovative projects and explore new directions in myriad avenues of communication, from design, music and film to photography, publishing and the Internet.” These artist-experimenters are accompanied along their research path by leading figures in art and communication, blurring the boundaries of culture and language and transgressing the traditional borders between a diverse range of communication mediums. Communication research at Fabrica services a wide variety of social causes and disciplines such as economics, social and environmental sciences. Fabrica’s aim is to grasp the future by giving innovative exposure to cultural or scientific projects which open a window onto tomorrow’s world.

⁴⁰ www.laboratoire.org

⁴¹ www.fabrica.it

KEY OBSERVATIONS:

A combination of creativity and high quality consumption creates a unique experience that attracts a range of people who participate in different ways. Mertola, Mass MoCA, Le Laboratoire, and Fabrica all, to varying degrees, offer visitors an opportunity for professional and personal development in order to improve the experience on offer. At the same time, visitors can also simply view (consume) contemporary art, heritage, design, innovation and the fruits of collaborative arts/science experiments. In these instances, which attract ‘creative workers/travelers’ from all over the world, the distinction between visitors and participants is blurred.

Economic Development

The Lowry National Landmark Millennium Project for the Arts, *Salford UK*⁴²



Photo: Lord Cultural Resources

The Lowry opened in April 2000 and is an important success story in using culture as a tool for urban revitalization. From its initial impetus to transform the derelict Manchester Ship Canal into Salford Quays, it grew to becoming a cultural centre with two theatres, a home for Salford’s little known but nationally important collection of paintings by L.S. Lowry, and a changing exhibition gallery. In addition, the Lowry Trust recognized the need for a critical mass of cultural attractions and persuaded the Imperial War Museum to

locate its northern branch near the Lowry. The project was the largest millennium project outside of London and cost BP120 million. As of October 2007 the total value of inward investment surpassed BP 3-billion, and by October 2007, 6,500 jobs were created within the area. It is regarded as one of the most successful regeneration projects in Europe, Salford Quays is now home to hotels, shopping, residential development and, soon, the Manchester offices of the BBC.

⁴² www.thelowry.com

The Guggenheim Museum, *Bilbao*⁴³



The Guggenheim Museum, Bilbao, as described above, has demonstrated the significant economic impact that can be generated through an investment in a high quality cultural attraction. The success of the Guggenheim, Bilbao (800,000-1 million visitors a year) has sparked a transformation of the area including new hotels, a concert hall and convention centre, a transport system, and cafes and restaurants. In addition, it contributes €212 million and has created and sustained 4,200 jobs.

KEY OBSERVATION:

A major project that has quality, distinctiveness (including scale), creativity and is located in an area where there is room to grow can lead to major economic benefits.

⁴³ www.guggenheim.org

Lessons for Ontario

The Best Practices above provide the following lessons for Ontario:

- Iconic cultural buildings that are major, distinct and ‘stand-alone’ (versus an addition to an existing building) can be a major pull in attracting cultural tourists.
- ‘Big Names’ – i.e., well-known brand signifiers, are an important indicator of quality and are an important association for institutions or events to have. Ontario’s attractions need to feature Big Names – artists, curators, art dealers, collections – in order to attract significant number of cultural tourists.
- Scale can be achieved by clustering significant buildings together (such as the ROM and the AGO) through programming, which can also create distinctiveness.
- Tourists are motivated to visit distinctive cultural attractions. Ontario’s experiences can develop their level of distinctiveness through enhancing their unique attributes with high quality interpretation, positioning and marketing. Ontario as a whole must also position itself as a distinct, ‘must visit’ destination.
- Time-sensitive festivals and events are a strong way to build longer-term cultural experiences.
- Clustering maximizes a range of individual attractions to create an overall cultural experience that serves as a destination motivator for the cultural tourist. Ontario can take advantage of this strategy through positioning an appropriate city district as a cultural hub, and developing a range of programming options within this hub. This is also an important strategy to keep developing with respect to festivals and events (such as LuminaTO and the Shaw Festival).
- Creativity tourism is a growth area for the 21st Century cultural traveler. Ontario can further develop its cultural experiences by enabling opportunities for creative participation, while at the same time enhancing the quality and distinctiveness of its cultural attractions. Attractions that offer both creative and ‘consumptive’ experiences appeal to a range of visitors and can encourage repeat visitation.
- Economic benefit is maximized by major projects that are of high quality, distinctiveness and that have the space to expand to accommodate additional infrastructure development.

Five Main Observations: Visitors to Ontario

1. Although 'cultural tourists' have traditionally been regarded as 'pleasure tourists', there is a strong case to be made that both 'business' and 'visiting friends and relatives' segments are a valuable market for whom 'culture' can become a demand generator for future trips.
2. U.S. and Canadian tourists have many characteristics of cultural tourists and have the potential to become motivated entirely by arts, culture and heritage. These segments need to be continually engaged with something new to ensure repeat visitation.
3. European visitors continue to be an important market because of their much higher propensity to stay longer and spend more than tourists from closer to home. Europeans have longer holidays than Americans and they have, in some cases, more generous pension and retirement benefits, as such these segments can be expected to have growth potential. However, to meet their expectations, it is critical for Ontario's cultural attractions to be of high quality, distinctiveness and creativity. European tourists continue to have a high level of interest in Aboriginal culture as this is seen as a distinctive (and even unique) aspect of Canadian culture.
4. Both Mexico and India represent highly promising market segments that bear further research.
5. As the knowledge economy grows vis-a-vis the industrial economy, the demand for "creative tourism" will grow. Ontario's cultural destinations should be encouraged to leverage business travelers wherever possible by offering compelling reasons to visit and easy ways to book travel packages.

Cultural Experiences/Attractions in Ontario

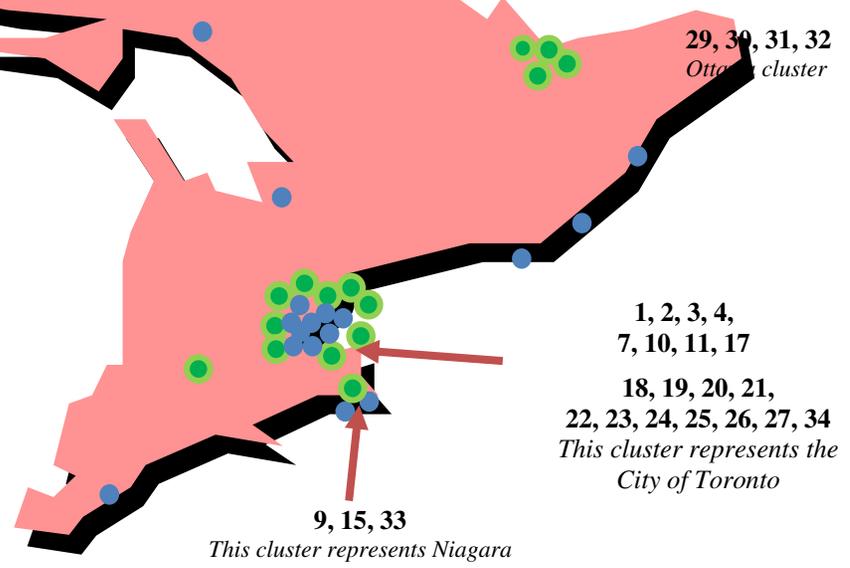
A high level review of attractions in Ontario reveal that there are over 500 that can be categorized as “cultural”⁴⁴. While many of these serve relatively small populations, there are a number of significant attractions (in status and in visitors attracted) dispersed as shown on the map below. Most of these are centered around Toronto and the GTA, the Niagara region and Ottawa.

⁴⁴ In order to gather an overview of cultural attractions in Ontario, which were regarded as and their level of visitation, the consultants referred to the official website of Ontario Tourism- www.ontariotravel.net with a specific focus on the geographical locations. The web-links under each region were each reviewed. Information on attractions was further researched against the Premier Ranked Tourist Destination Reports (www.tourism.gov.on.ca). Other sources include Primary www.tourism.gov.on.ca/english/research/rtp/index.html; <http://www.festivalsandeventsontario.ca>; www.summertheatre.org; www.arts.on.ca

Diagram 9: Cultural Attractions in Ontario

- Culture and Heritage Attractions or Festivals with Annual Attendance Exceeding 500,000**
19. Harbourfront Centre
 20. Toronto Alliance for the Performing Arts
 21. Caribana
 22. Luminato
 23. Nuit Blanche
 24. Buskerfest
 25. Toronto Jazz Festival
 26. Beaches International Jazz Festival
 27. Taste of the Danforth
 28. Stratford Festival
 29. Rideau Canal Heritage Route
 30. Canadian Museum of Civilization
 31. National Gallery of Canada
 32. National Capital Commission
 33. Shaw Festival (281,000 attendance in '08)
 34. Toronto International Film Festival (>34,000 in '08)

- Ministry of Culture and Ministry of Tourism Agencies with Cultural and Heritage Assets**
1. Art Galley of Ontario
 2. Royal Ontario Museum
 3. Ontario Science Centre
 4. Elgin and Winter Garden Theatres (Ontario Heritage Trust)
 5. Uncle Tom's Cabin Historic Site (Ontario Heritage Trust)
 6. Fulford Place (Ontario Heritage Trust)
 7. Enock Turner School House (Ontario Heritage Trust)
 8. Royal Botanical Gardens
 9. Niagara Apothecary (Ontario Heritage Trust)
 10. Ontario Heritage Centre (Ontario Heritage Trust)
 11. Science North
 12. McMichael Canadian Art Collection
 13. St. Lawrence Parks Commission, Fort Henry
 14. St. Lawrence Parks Commission, Upper Canada Village
 15. Niagara Park Commission
 16. Fort William Historical Park
 17. Huronia Historical Parks: Ste. Marie Among the Hurons, Discovery Harbour
 18. Ontario Place



How do Ontario Cultural Attractions Rate?

Global Cities Index

The Global Cities Index, developed by Foreign Policy magazine, T. Kearney, and the Chicago Council on Global Affairs, rates metropolitan areas worldwide using measures that evaluate:

- Business Activity: value of capital markets, volume of goods, etc.;
- Human Capital: how well the city acts as a magnet for diverse groups of people and talent;
- Information Exchange: how well news and information is dispersed about and to the rest of the world;
- Cultural Experience: level of diverse attractions for international residents and travelers measured by; and
- Political Engagement: the degree to which a city influences global policymaking and dialogue.

In their latest ratings (December 2008), Toronto is identified as the 10th most global city, and the fourth best for cultural experiences (placed behind only New York, London and Paris).⁴⁵

US and Canada Travel Intentions⁴⁶

However, in a more specific recent on-line study that measures the travel intentions of a range of Americans, primarily from the Great Lakes Basin and the Northeast Atlantic region from Washington DC to Boston, Ontario as a whole did not fare quite so well.

According to this study, **Americans scored Ontario as 6.8 out of a scale of 1-10 as a destination for arts, culture and history.** This is an increase of +0.3 since 2005, but is still behind enjoying nature (7.3), a touring trip (7.1), or a big city trip (7.0). However, arts and culture scored higher than a resort trip (6.3). Canadians scored Ontario as a 7.2 – a consistent score since 2005.

These findings show a slight improvement to a 2005 study that asked a selection of Americans to rate Ontario's cultural attractions⁴⁷. In this earlier study:

⁴⁵ Global Cities Index, Foreign Policy magazine. **T. Kearney, and The Chicago Council on Global Affairs**, November/December 2008, http://www.foreignpolicy.com/story/cms.php?story_id=4509.

⁴⁶ Travel Intentions Study Wave 10 (May '08), presented to Ontario Tourism Marketing Partnership Corp. FedNor – Industry Canada, Ontario Ministry of Tourism, July 9th, 2008, http://www.tourism.gov.on.ca/english/research/travel_intentions/index.html

⁴⁷ The Awareness and Ratings of Ontario's Major Cultural Attractions by American Travelers, Ministry of Tourism, Tourism Branch, June 2005

- Ontario received an average rating of 6.7 out of 10 points for its ‘arts, culture and history’ experience. Those who rated Ontario higher, had been to Ontario at some point in the past, and 45% were cultural tourists (i.e., they had been for a trip ‘that was primarily to experience arts, culture and history’).
- 9% of American travelers could not even rate the province on this attribute.
- Compared to other aspects of Ontario as a travel destination, its reputation as a destination for nature and the outdoors gets the highest rating (7.5 points), followed by ‘a touring trip’ (7.0 points), ‘a big city trip’ (6.7 points) and a ‘resort trip’ (6.4 points).

**Among Americans surveyed in the Travel Intentions study of May 2008, *Toronto* achieved a rating of:

- 7.4 out of 10 as a great place to visit art galleries and museums.
- 7.5 out of 10 as a great place for theatre and other cultural performances.
- 7.5 out of 10 as a great place for cultural and arts festivals.

Gaps and Opportunities

According to our analysis and experience, the following gaps and opportunities have been identified:

- **Ontario’s cultural attractions do not have enough brand recognition to compete with a range of cultural attractions available at international destinations.** For example, Toronto’s major cultural institutions do not have Blockbuster Exhibitions from museums like the Louvre, which are “high quality” brands. Toronto theatre has fewer quality-branded (Broadway quality, Broadway stars) theatre productions than in the past. Ontario Place, which was once seen as high quality and distinctive, now appears to be tired and out of date.
- **Ontario’s cultural attractions are not seen to offer a distinctive experience.** Ontario offers a broad range of tourist experiences but so do many of the border states. The distinctiveness of many of our performance offerings could be improved with, for example dramatic new buildings (for Shaw and Stratford) or by packaging with highly distinctive historic sites like the nearby underdeveloped Underground Railway sites. A 2007 research study commissioned by the Canadian Tourism Commission found that **cultural experiences related to Aboriginal culture are considered to be truly distinctive to Canada**⁴⁸. Best practices research (see Appendix A) illustrates varied and creative ways that jurisdictions have used to develop these kinds of opportunities.
- **There is a new opportunity to develop “creativity-based” tourism that appeals to the 21st Century Traveler.** There is an opportunity to develop and position Ontario as a strong creative tourism destination. Ontario is currently investing in the Innovation Agenda, which recognizes the role of the creativity sector.⁴⁹
- **On the whole, Ontario’s cultural attractions do not provide a full range of experiences on the continuum of participation—i.e., between pure consumption and creativity (participation).** Most cultural attractions tend to aspire to a high quality experience. There is an opportunity for many of these attractions to increase their creativity offering; thereby providing a counterpoint to the more consumption based traditional offerings.
- **Ontario’s cultural products do not necessarily appeal specifically to the new emerging diverse cultural market segments, many of whom are visiting Ontario to visit friends and relatives.** Other than the Harbourfront Centre, many of Ontario’s cultural attractions struggle to attract new emerging market segments. However, as indicated above, this is an area that bears further research.

⁴⁸ Research conducted in 2007 for the Canadian Tourism Commission shows that many consumers – Europeans in particular – are seeking opportunities to visit Aboriginal communities and have direct contact with Aboriginal people and lifestyles. However, these experiences and products must be ‘authentic.’ “Authenticity: Tourists and First Nations Insist on it!” Tourism Magazine, volume 005, issue 04, April 2008, http://www.corporate.canada.travel/corp/media/app/en/ca/magazine/article.do?issuePath=templatedata%5Cctx%5CmagIssue%5Cdata%5C2008%5Cissue04%5Cissue2008_04&path=templatedata\ctx\magArticle\data\en\2008\issue04\news_and_opinion\authenticity

⁴⁹ “SEIZING GLOBAL OPPORTUNITIES: Ontario’s Innovation Agenda, www.ontario.ca/innovation”, Ministry of Research and Innovation

- **Time-limited reasons to visit (festivals, events, blockbuster exhibitions) are not adequately linked with visitor infrastructure⁵⁰, nor adequately marketed to the cultural traveler.**
- Most of Ontario's cultural attractions are in Toronto and Ottawa. In order to attract significant travelers to other areas of Ontario, and at different times of the year, a clustering approach is recommended.

In the next chapter, a strategic framework is provided against which culture and tourism stakeholders may review potential cultural tourism initiatives in order to ensure growth in Ontario into the 21st Century.

⁵⁰ Visitor infrastructure refers to accommodation (hotels, bed and breakfasts, motels), tourism booking infrastructure, transport, tours, etc.

Attracting the 21st Century Cultural Tourist: A Strategic Framework

In the preceding section we have outlined the characteristics of the 21st Century Cultural Tourist, explored some international Best Practice examples and evaluated Ontario's current cultural offerings.

Arising from an analysis of the gaps, this report's central recommendation is that:

- **Ontario's cultural products need to be improved in terms of quality and distinctiveness to be truly competitive in the global cultural marketplace.**
- **"Creative" tourism can be the point of distinctiveness for Ontario, which has invested intensively in the knowledge economy and innovation. Indeed "creative cultural tourism" could be the distinctive Ontario brand in the cultural tourism market.**

Quality and Distinctiveness

Traditionally, an experience needed to be both high quality and distinctive in order draw high numbers of cultural tourists. Globally, as seen in a number of the Best Practice examples, those attractions that excelled met both of these objectives. Museums with outstanding and unique collections; iconic buildings; unparalleled story-telling and interpretation; legendary performers; and celebrated heritage sites, attracted the lion share of cultural tourists.

Quality

For the 21st Century Cultural Travelers who are motivated by a cultural product or experience to visit a destination, the **quality** of the cultural experience is the number one factor in deciding to visit. The quality criterion is not unique to culture – hotels and airlines also compete on quality. However, for many sectors of the tourism industry (including travel and accommodation), ‘price’ surpasses ‘quality’ as the most important criteria for choosing a travel experience. This is not the case for cultural tourism.⁵¹

There are a number of **brand signifiers** that serve as an indicator of quality for the cultural tourist. These are big, recognized names such as “Louvre”, “British Museum”, “Broadway”, “West End”, “Topkapi” which have come to symbolize a quality experience. Iconic works of art (Mona Lisa) and artists (Monet) also represent quality. In the 21st Century, there is a growing number of contemporary artists and works of art (Jeff Koons, Floral Puppy), architects (Frank Gehry, Zahra Hadid, Daniel Liebskind) and performers (Reese Witherspoon, Keira Knightley, or James McAvoy- as seen at this year’s Toronto International Film Festival) that signify quality.

Brand signifiers, alongside ‘**word of mouth**’, ‘**knowledge**’, and ‘**personal experience potential**’ (an individualized subjective judgement) are the key indicators of quality for the 21st Century traveler.

With their new iconic building additions, both the Royal Ontario Museum and the Art Gallery of Ontario are on the way to representing an international standard of quality but our review suggests that they are not there yet.

⁵¹ Throsby, David, Economics and Culture, Cambridge University Press, UK, 2001.

Distinctiveness

This criterion used to be referred to as “uniqueness”; however it is now recognized that unique means “one of a kind”. Today it is the sum total of an experience that is unique and rarely a single cultural attractor, particularly for Ontario - with the exception of Aboriginal culture, which is explored in more detail in Appendix A.

Distinctiveness refers to the way that a particular cultural product distinguishes itself in the cultural market place such as:

- Scale (smallest, largest, most spectacular)
- Authenticity (best preserved, most accurate representation)
- Unusual (in setting, design, production)
- Time bound (limited time availability, seasonality)
- Prestige (the number of highly branded factors)

In most instances, distinctiveness results from a combination of the above.

There are few cultural attractions that become destinations based on only one of these criteria. London’s West End (Theatreland), New York’s Museum of Modern Art, the Vienna Opera, and the Louvre in Paris are four such examples. These have taken years of consistent investment to develop. The Guggenheim in Bilbao is the exceptional example of creating a powerful cultural destination in just 10 years. Other cultural attractions are trying but few are succeeding to the degree they dream.

Given the challenges of being a truly ‘unique’ experience, the “classic” cultural tourism destinations continue to add new and more creative attractions to the mix in order to develop their ‘distinctiveness quotient’.

For example, London added “Tate Modern” (2000) to project its role as a creative city; Vienna added “The Museums Quartier” (1998) to attract younger travelers to a city seen as being for the ‘grey rinse set’; in 2008 Paris opened “Cent Quatre”, a huge center for artistic creation in an effort to attract major contemporary artists to create works in Paris and to attract travelers to watch them and attend conferences there.

Creativity

With the advent of the creative worker, and the rise of the ‘prosumer’, cultural attractions must satisfy the needs of a person whose motivations and behaviour while traveling mirrors the blurred boundaries between leisure and business at home.

In this instance, the total experience of travel becomes a determinant of its success – ‘What did I learn? How did I change? What did I change? Who did I meet?’ become critical questions in assessing the value and the ‘repeatability’ of an experience. For an experience to be successful, it must provide opportunities for creativity.

Creativity means one or more of the following:

- Engagement of the visitor in constructing the experience of a destination through active exploration and participation.
- Learning through courses, conferences, studio work (whether the focus is a work of art, theatre, design, a report or paper, scientific experiment, sculpture, television series, website, etc.).
- Personal or professional growth and development.

There are significant trends in the 21st Century pointing to an evolution in cultural tourism toward a 21st Century Cultural Traveler who seeks creative experiences.

We are therefore recommending that “Creativity” be the third criterion in the cultural tourism model.

The 21st Century Cultural Traveler

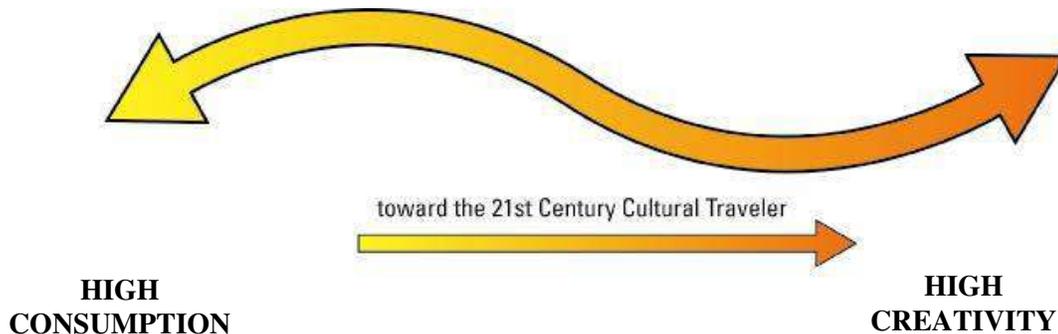
In the 21st Century, the tourist is motivated by being engaged in constructing the experience of a destination through active exploration and participation. This segment is most likely to be a knowledge worker engaged in the creative economy who ‘travels’ rather than ‘tours’— and as such should be seen as the 21st Century Cultural Traveler.

Providing a Continuum of Experiences

The traditional model of cultural tourism was a ‘consumptive’ one. That is, cultural tourists went to ‘see’ a museum, a gallery, a performance. While they were happy to consume these experiences voraciously, their engagement was relatively passive. That is, while they were often actively engaging in the stories presented by curators, or guides, the art works, the performances—they were recipients of the experience – their presence did not change it, nor did they want it to. For the new 21st Century Traveler, however, active participation is part of his/her experience of the world. He or she is likely to seek out a ‘creative cultural tourism’ experience that provides an opportunity for personal transformation and professional development.

However, it is important to recognize that the idea of creative tourism does not mean that a traditional, consumption-style tourism has ceased to exist, nor is waning in popularity. Rather, **for experiences to continue to attract both the old and the new successfully, it must be of high quality, be highly distinctive *and* be highly creative.**

For a destination⁵² to excel, it needs to provide a continuum of experiences from those that are ‘consumed’ to those that are ‘created’ as in the diagram below:



This diagram symbolizes the subtle shift that is taking place in the 21st Century among cultural tourists.

The traditional model of cultural tourism is represented on the left side of the diagram as high consumption. In this mode, cultural tourists travel to a destination to consume theatre, exhibitions, historic sites, festivals and events. This remains a very important aspect of cultural tourism into the 21st Century. However, as a result of the demographic and psycho-graphic trends described in Section 4 above, there is a growing new cultural tourism market characterized by the desire to have “creative participatory experiences” and to pro-actively construct one’s own cultural experiences, an experience represented by the far right of the diagram.

⁵² (i.e., a total cultural experience made up of a range of specific experiences)

The “high creativity” demanded by the new cultural traveler is beneficial to Ontario because the Province has already invested heavily in the knowledge economy and in “innovation”.⁵³ Ontario’s theatres, museums and historic sites are reasonably competitive in terms of quality and distinctiveness with the best in the world; but **the Province’s position with respect to innovation has the potential to surpass other regions.** The challenge is how to make these creative experiences accessible to the Cultural Traveler who seeks an experience on the right side of the diagram.

⁵³ As referenced in the Introduction, Ontario has committed to pursuing an Innovation Agenda which aims to ‘build on the strength of Ontario’s creative environment, diverse culture, highly skilled workforce, world-class educational system and internationally recognized research community’ to become one of the ‘winning economies of the 21st Century.’

Economic Benefit

We have included economic benefits in the model. The main method of adducing these in this brief study is by analogy with best practices.

Some of the key factors leading to a high rating in ‘economic benefit’:

- Attractiveness to travelers from a long distance (since long haul travelers spend more money and represent “export tourism”)
- Opportunities for new business spin-offs
- Job creation

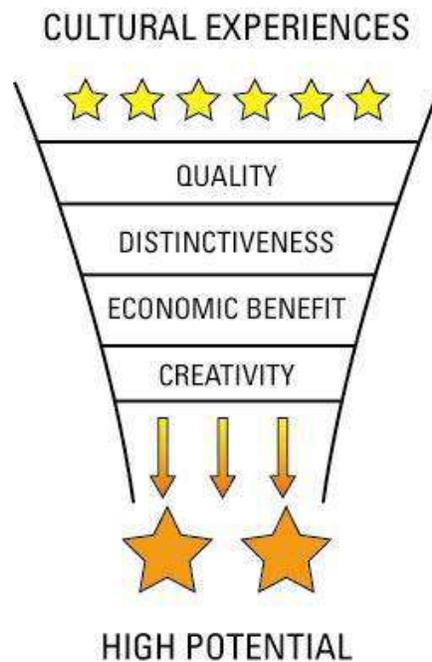
A Note on Geography

****While we have not included geography as part of the High Potentiality Filter, it is an important consideration. If an opportunity is to be properly assessed to be high potential it needs to be complemented by certain tourism infrastructure, such as accommodation, dining, retail, and transportation. Tourism experiences which have a high potential to attract the 21st Century Cultural Traveler must have this infrastructure in place and also benefit from a critical mass of ‘secondary’ cultural attractions. Thus, most of the High and Medium potential opportunities are located in major urban centres or in regional centres that offer tourism infrastructure and a range of complementary attractions.*

A 21st Century Framework for Evaluating Cultural Tourism Products

The scope for this study includes developing a model which can be used to evaluate and prioritize cultural tourism products. Since this study was intended to be “consumer driven” in its approach, the model developed by the consultants is based on the trends in the cultural tourism market place as described earlier in the report. Thus the key elements of the model are: quality, distinctiveness and creativity. We have also added the criterion of “economic benefit”.

Diagram: A 21st Century Framework for Evaluating Cultural Tourism Products



The Framework Illustrated

Examples that illustrate how the framework detailed above could impact Ontario's cultural attractions are found below:

Ontario Place.

As is, Ontario Place is a summer only entertainment attraction that caters largely to the local market. In order to transform Ontario Place into a competitive cultural attraction, the Ontario government could look at how to improve the quality, distinctiveness and creativity of the experience. One solution would be to build a high-profile stand-alone iconic building ('an architectural wonder of the age'), as well as to cluster together a number of strong attractions – new and planned on site. A possible anchor attraction could include the Science Centre – a proven success in attracting a range of local visitors. Other attractions to be clustered around the Science Centres would offer creative programming. The whole precinct could be branded as a Science and Innovation Park (like Cite des Sciences in France) and would offer a range of consumptive and creative experiences. It should also make a concerted effort to develop programming to attract new emerging markets in Toronto.

TIFF-Bell Lightbox.

The Toronto International Film festival already offers a high quality, distinctive experience featuring a number of brand signifying actors, and directors. To increase its potential, the Bell Lightbox would be developed into a year-round creative experience to attract creative travelers, relating in particular to the film industry.

Nuit Blanche

Already a successful event in attracting visitors, Nuit Blanche's experience could be further improved for the 21st Century Traveler through clustering it with the Toronto Art Fair, increasing the quality of the experience – through ensuring the participation of high profile artists and curators, and building on associated opportunities for creativity (e.g., a series of year-round studios for emerging artists worldwide culminating in an exhibition at Nuit Blanche).

Linkages and Integration

The goal of this section is to explore strategies to better equip and position Ontario's cultural tourism experiences in a way that will attract the 21st Century Cultural Traveler.

The Current Landscape:

The following represents our thoughts related to the current landscape based on our experience and analysis.

Stakeholders in 'Culture'

The core stakeholders involved in culture and heritage across the province are for the most part governmental (both provincial and federal) or not-for-profit entities. **It is worth noting that there are few municipal cultural entities that are of a significant scale and size to be tourism attractions. Cities are successful stakeholders in cultural tourism primarily in "Festivals and Events"**.

The larger public cultural organizations are located in the major urban centres, but a significant number are in smaller centres – particularly historic places, which are located in situ. Because of capital investment and operating support, government entities lead the way as tourism attractions. For the most part these organizations understand and are involved in the tourism industry and do consider visitors from outside the host region as part of their mandates.

Smaller not-for-profits (both permanent facilities and events) are less likely to have a focused strategy for attracting tourists. They typically plug into the activities of a local Destination Marketing Organization (DMO), but normally do not have the budgets to participate at a significant level. They rely heavily on non-recurrent government funds, grants, sponsorship and donations to fund and sustain the organization. As a result the on-going stability of these entities can be in jeopardy year-to-year or even month-to-month. Staffing, for example, is handled by utilizing a combination of paid staff and volunteers.

Volunteers make up the staff compliment of many culture and heritage organizations, especially within the festival and events segment. This can be viewed as a positive as in most cases the volunteers live in the community and have a particular knowledge and or interest in the organization and the expression of its cultural or heritage offering. This can be attractive especially when the organization is community based and relies primarily on the local community for attendance and participation. Volunteer-based organizations may suffer from a lack of market readiness due to limitations of not having sufficient dedicated paid staff. While the volunteer offers knowledge, personality and character to the visitor experience, day in and day out the quality of the experience may be affected due to inconsistency in training and skills.

Stakeholders in Tourism

The tourism industry within Ontario is vast and tourism businesses can be found in virtually every part of the province. The industry is made up of local and international private owner/operators, public sector entities, regions and municipalities, sector based associations and tourism marketing organizations. The tourism industry in Ontario is highly developed and the province has a rich heritage as a leading tourism destination on a world stage. The Ontario government has provided significant leadership in that regard and invests heavily in the development and promotion of Ontario as a growing and viable visitor destination.

Under the leadership of the Ontario Tourism Marketing Partnership Corporation (OTMPC), Ontario is marketed to several of its key markets around the world. A significant portion of the effort is directed at convincing more Ontarians to travel in their own province and the OTMPC is constantly monitoring its success and adjusting its marketing efforts to maximize its return on investment. The OTMPC targets leisure travelers, the travel trade, wholesalers and tour operators in domestic, U.S. and overseas markets, as well as the meetings conventions and incentive travel markets. They offer a number of joint marketing opportunities where destinations and independent business can buy-in to specific marketing and advertising opportunities. They produce visitor publications and web sites to service the visitor market and these all have buy-in opportunities where industry can purchase space to promote a particular business or destination.

Several culture and heritage entities participate in these joint-marketing opportunities. It is safe to say, however, that it is the larger public organizations that have their resources to participate. The smaller not-for-profit entities do not as a rule participate.

Culture and heritage entities are considered to be key stakeholders in Ontario's tourism industry. The collection of culture and heritage attractors figures prominently in the marketing of Ontario. Images of these attractors are often used in promotional material and, as stated earlier, the larger organizations buy in to many of the joint marketing opportunities.

“Culture vs. Tourism”

Cultural tourism exists at the nexus of two traditionally separate industries: culture and tourism.

Traditionally cultural tourism invites visitors to experience ‘culture’ as presented by people in the host community. For the most part, creators of a cultural experience are artists whose primary motivation is probably NOT catering to the ‘tourist’. As such a *disconnect* exists between the motivations of those creating culture, those who market a particular destination, and the tourist consuming it.

This Disconnect is Far From Insurmountable.

In order for the stakeholders of the culture and tourism industries to come together to develop an experience that welcomes Cultural Travelers (or at one extreme that caters wholly to them), it is imperative that everyone feels that their interests are **not** mutually exclusive and are often, in fact, entirely compatible.

This requires bridging the division, real or imagined that exist between stakeholders and representatives of both industries. It also requires creating an enabling environment for both industries to work together. When it does happen typically the tourism business, for the most part an accommodator, is the one who attempts to create linkages recognizing that in order to sell bedrooms the potential guest needs a reason to visit.

In Toronto this happens more frequently with some hotels leading the way. For example the Delta Chelsea Hotel has been a leader at creating linkages with featured attractions, events and cultural performances that take place throughout the calendar year in the city. By combining a room night, food and beverage offer and tickets to a performance, usually commercial theatre, the Delta Chelsea has gained a reputation in the marketplace as the “entertainment hotel”. Organizations like the Toronto Entertainment District also have created packages that include theatre, symphony, event, comedy, sports and other performance based visitor packages.

Another good example of good linkages is demonstrated by the Alliance of Summer Theatres Round Ontario (ASTRO). This organization sells theatre packages for their 25+ theatres that include all-inclusive ticket, hotel and dining options.

Ontario’s Brand Positioning

Ontario has worked to establish a solid brand position in the marketplace through the Ontario Tourism Marketing Partnership Corporation (OTMPC). In recent years the OTMPC has developed a brand position that has resonated with many of its North American customer segments. The “Ontario Yours to Discover” brand has a rich heritage as it was the line used to position the province in the 1970s and early 1980s. Consumer research done by the OTMPC consistently validates this positioning line, therefore in our opinion, Ontario’s overall positioning continues to reinforce positive perceptions from its target consumer groups.

Key Challenges

Improving Linkages

There is no formal process to determine the quality of linkages that exist between the culture and tourism sectors. However, based on extensive experience working with tourism organizations in the province, it can be concluded that there are a number of examples of good linkages or partnerships.

Destination Marketing Organizations

For the most part linkages are created as a result of a DMO's attempts in various destinations to market the collective experiences that are available. The DMO becomes the facilitator of partnerships and linkages. The DMO understands the need to create a variety of experiences to present to its target visitors therefore proactively engages those in the community. This is a primary role of the DMO. Typically there exists individuals in a destination who drive the need to create reasons to visit. These usually are those who are tightly connected to servicing visitors. For examples hoteliers, attractions operators, select restaurateurs and retailers.

However, getting the attention of those who offer cultural and heritage experiences is more challenging especially among those from the smaller not-for-profit sector. Some cultural organizations proactively partner with other tourism businesses within a region or city in isolation from the work the DMO does. **In our experience, however, these linkages are not occurring across the province with any regularity or with any notable benefit.** We see two primary reason for this, lack of understanding and limited financial resources allocated to marketing.

Market Readiness, Sustainability, Product Enhancement

Market readiness, sustainability and product enhancement are the primary challenges for many cultural and heritage attractions across the province. A review of various Premier Ranked Tourist Destination Framework (PRTDF)⁵⁴ reports indicated that most destinations and their culture and heritage product and experiences are underdeveloped and under-performing. Each destination's culture and heritage offerings have unique challenges but all share a common deficiency related to market readiness, experience development and sustainable funding.

⁵⁴ The Premier-ranked Tourist Destinations Framework is an assessment and evaluation tool developed by the Ministry of Tourism to inventory and analyze a region's tourism amenities and attractions and identify opportunities for tourism investment and development. It is designed to result in a strategic action plan for tourism to improve the region's performance in the tourism marketplace. The Premier-ranked Tourism Destinations Framework has been completed in 20 communities across Ontario.

While investments have recently been made to some culture and heritage attractions – for example, Fort Henry and Upper Canada Village – more attention and investment is required. By conducting detailed research and analysis of first, the Ontario-owned attractions and second, the top tier private sector and not-for-profit attractions, the Ministries will be able to prioritize needs and establish a long-term strategy to address those needs. Priority should first be directed at those attractors owned and or operated by either the Ministry of Tourism or Ministry of Culture. Against the backdrop of what the 21st Century Traveler is seeking, an evaluation of these properties should produce a list of opportunities that when addressed will enhance each of the Ministries owned attractors.

Stakeholder Relationships

Using the learning from the PRTDF reports and drawing from experience working throughout the province, the consultants ascertained that communications between industry members in general is poor. While DMOs attempt to facilitate connections through communication, they are marginally successful at getting the tourism industry to communicate, let alone create linkages and partnerships. Surprisingly larger communities like Ottawa and Toronto connect more effectively than those in smaller communities.

The Ministries should help facilitate a process to bridge this communication gap. Field representatives from the Ministries of Tourism and Culture have significant credibility in each region of the province. From our observation these individuals are experienced culture and tourism consultants who know their region and business. Field representatives are viewed as natural facilitators in the regions in terms of building a process to increase linkages and partnerships within a particular destination or region; this is in addition to their considerable on-going tasks and activities.

Packaging

In order to attract and welcome Cultural Travelers to Ontario, cultural experiences need to be positioned, packaged and marketed in such a way as to speak positively to the needs of the 21st Century Cultural Traveler. Currently the OTMPC does a good job presenting Ontario in a broad manner attempting to capture the interest of a large segment of North American tourists. It is our observation that within the North American market Ontario could be more effective in terms of speaking directly to the needs and wants of the 21st Century Cultural Traveler. While its efforts are consumer driven utilizing a series of research backed market segmentation (as shown above) few if any of the North America market segments capture culture and heritage enthusiasts in a way that may prompt an inquiry and a subsequent visit.

For example, a review of its 2008 edition of the *My Ontario* magazine is limited in terms of the cultural and heritage experiences presented. While it has some content pertaining to these experiences and ads do appear from some of Ontario's cultural and heritage attractors there is not a feature article that addresses this important asset.

OTMPC's website does recognize "Arts and Culture" as a sub-head under the category 'Things to Do'. On those pages it does present a cross section of activity titles and pages under the following descriptive text:

"Arts and Culture

Take your seat for a stellar performance. Enjoy Broadway blockbusters or innovative local theatre on Toronto's diverse stages. Discover summer theatre and music festivals that bring the entertainment outdoors where you can see great singers perform from a floating stage or drama coming to life on a picturesque farm stage. Paint, sculpt or photograph nature where inspiration surrounds you. Be dazzled by Ontario's myriad museums and their signature collections including rare ceramics, classic canoes, fantastic footwear and more. Whether you are moved by old masters or inspired by avant-garde installations, you'll delight in wide ranging art galleries. From drama to dance, landscape paintings to symphonies and music, come share Ontario's heart for the arts.⁵⁵ "

That is followed by links to additional pages under these categories:

- Discover Arts and Culture in Ontario
- Art Galleries / Museums
- Live Performance
- Theatre Getaways

OTMPC also offers packages that include purchasable cultural experiences. These are found under a retail packages product called "Distinctive Getaways".

This approach focuses solely on the consumption aspect of culture. This is a most important element in cultural tourism. However, as is made clear previously in the paper, the element of participation (which links to creativity and to Ontario's innovation agenda) presents a way of expanding this market to the 21st Century Cultural Traveler.

Funding for Cultural Tourism Development

Once Ontario's culture and heritage tourism products and experiences are ready to go to market (and only when they are ready) the Ministries need to re-think their cooperative marketing programmes.

On their own, most of Ontario's culture and heritage attractors do not have the financial resources to go to market. In our view, they will rely more on affordable partnerships that allow them to reach desirable target markets. At the same time DMOs should be encouraged to create culture and heritage tourism packages and when they do this the Ministries must have "affordable" marketing partnership programmes to offer the DMO. Incentives should be created to encourage both DMOs and cultural attractions to develop innovative and attractive packaging in order that these experiences can be promoted to the appropriate potential customers.

⁵⁵ OTMPC web site, www.ontariotravel.net

Research – Collection and Dissemination

Information gaps exist. There appears to be gaps in the research information available to help destinations and individual organizations better develop and market their culture and heritage tourism experiences. While province-wide information may be available, region or destination specific information is limited.

Our observation is that some of this valuable information does not make its way into the hands, or heads, of the decision makers within destinations, public, not-for-profit and private sector organizations.

Clustering

Other than Ontario's major cultural tourism centres (Toronto and Ottawa) most destinations do not have cultural or heritage attractors that draw significant year-round visitation. Therefore as we attempt to grow travel to a given area through cultural and heritage tourism offerings destinations are an important element of growth is to cluster experiences in order create both appeal and critical mass. A collection of heritage sites that tell the story of a geographic area or of a people is far more compelling than any one single entity. Clustering requires conversation, creativity and partnership. Ontario's destination marketing organizations have an opportunity to facilitate dialogue so clustering of cultural tourism experiences can be developed and promoted.

Best Practice

There are a number of examples internationally and “in our own back yard” that point to innovative ways in which cultural tourism is able to benefit by strong linkages, and integration amongst varying stakeholders. Some of these are as follows:

Reaching New Tourist Markets

The Cultural Access Pass⁵⁶: The Institute for Canadian Citizenship gives out the Cultural Access Pass to new Canadians. As of April 10 2008, the pass provides free admission to six museums in Toronto for new citizens and their family for one year. The six museums are the Art Gallery of Ontario, the Gardiner Museum of Ceramic Arts, the McMichael Canadian Art Collection, the Ontario Science Centre, the Royal Ontario Museum, and the Textile Museum of Canada.

The Coalition of New Canadians for Arts and Culture⁵⁷: The CNCAC promotes employment opportunities in the arts sector for new Canadians, immigrants and refugees. The Coalition, which gained official non-profit status in April 2008, grew out of community development work at the Ottawa Community Immigrant Services Organization. The CNCAC focuses on finding work opportunities for new Canadians within Canada’s culture and heritage experience, in order to broaden the awareness of these entities amongst this growing segment of the Canadian population. This in turn will encourage exploration of our culture and heritage with the employed individuals as well as others within this community, including their visiting friends and relatives.

Blockbuster exhibitions and themes focussing on cultures and civilizations apart from the host community: These have the impact of attracting new resident communities, drawing visiting friends and relatives from those communities and attracting tourists. For example, in 2005, ‘Russia!’ was a Blockbuster at the Guggenheim in New York, which represented the largest ever exhibition of works of art from Russia ever shown in the USA. This exhibition attracted a record number of visitors (401,885 in 17 weeks)⁵⁸ to the Guggenheim, including a large representation of Russian residents from the region and their visiting friends and relatives. Another example is the initiative by the French government in the Pompidou Centre, which proclaims a celebration of a different country and its culture in Paris. One of the biggest celebrations was the year for China (“Alors, La Chine?”) in 2003, which attracted significant attendance (105,000 visitors) during its 96-day run.⁵⁹

⁵⁶ <http://www.icc-icc.ca/en/culture/>

⁵⁷ <http://www.cncac.ca/>

⁵⁸ <http://www.guggenheim.org/new-york/press-room/press-releases/press-release-archive/2006/602-january-20-russia-closes-as-one-of-the-most-successful-exhibitions-in-guggenheim-history>

⁵⁹

[http://www.centrepompidou.fr/Pompidou/Communication.nsf/docs/ID4F2784865B350103C1256D58002CD170/\\$File/chineanglais.pdf](http://www.centrepompidou.fr/Pompidou/Communication.nsf/docs/ID4F2784865B350103C1256D58002CD170/$File/chineanglais.pdf)

Innovative Communication Strategies

The Internet has opened up many new opportunities for communicating to a range of ‘communities of interest’. Social media sites, such as Flickr, YouTube, Facebook and Twitter, have enabled the sharing of experiences once the sole purview of ‘word of mouth’ communication. **Flickr** is particularly interesting to note as the site of choice for cultural word-of-mouth marketing. On Flickr, people post photos of events and places that have inspired them enough to share. Those cultural attractions that inspire a photo (i.e., that provide *spectacle*) are the ones that are circulated more frequently. As of December 2008, for example, the Guggenheim Bilbao was showing 26, 393 posts, Nuit Blanche was showing 21, 663 posts, and LuminaTO, 6, 947.

As such, the Internet is an ideal medium to bring together the 21st Century Traveler and 21st Century Cultural Experiences.

There are a number of innovative Internet-based communication networks that are successfully directing potential travelers to a range of events and experiences.

Akimbo⁶⁰ is a good example of Best Practice in this instance.

Akimbo is a private sector operated email service available for free to subscribers. It provides up to the minute information on “everything art and creative” for the Toronto and Ontario cultural community. Akimbo was founded in 1998 by Kim Fullerton, an arts administrator and curator, and has 7,000 subscribers. Every month, the website gets 2.5 million hits, and 75,780 sustained visits-where visitors load multiple pages per session. In addition, Akimbo’s RSS feeds get 53,033 hits per month.

Collaboration Leading to Clustering

London’s Cultural Olympiad⁶¹. Like other cities that host the Olympics, London has introduced a Cultural Olympiad to coincide with the 2012 Olympic Games. The campaign is to last for four years, from September 2008 to the end of the Games in 2012. The goals are to increase tourism to London and to create buzz about the Olympics through marketing of cultural events and attractions.

- The organizing entity is LOCOG (London Organising Committee of the Olympic Games and Paralympic Games).
- Organizations throughout London must submit a proposal to be included as part of the Cultural Olympiad network of organizations and events.
- The benefits are direct marketing under the Cultural Olympiad logo.
- Organizations are also allowed to use the logo in their own publications and marketing campaigns.

⁶⁰ <http://www.akimbo.biz/>

⁶¹ www.london2012.com/get-involved/cultural-olympiad/index.php

Funding for Cultural Tourism Development

Centquatre, Paris, France. The city of Paris has established a new type of art centre called the Centquatre (104, after the address) in the 19^e arrondissement. It is in a renovated former public funeral 'factory' with a very high central area between studio rooms to either side. It comprises 39,000 sq m (c 400,000 sq ft), of which:

- Over 4,000 sq m accommodates 18 artists' studios.
- Over 6,000 sq m are available for events, seminars and for rentals.

The concept is to offer international artists residencies of 1 to 10 months in the studios, on condition that the works they produce will be on view at the Centquatre for at least five years, with option to renew for another five, after which the works remain the property of the city and enter the city's collection. The centre is also big enough to accommodate art fairs, the first of which was held there in October. Five finished works are already on display: Spanish, English and Albanian artists are now at work there.⁶²

The city council provided over €100 million (\$150 million CDN) to renovate the space over 27 months, plus €560,000.00 for initial new commissions of works of art. 10 private sponsors (including a major bank and a private healthcare group) donated €1 million each. The city is also committed to supporting an annual operating budget of €8 million (\$12 million CDN).⁶³

Research and Support

Aboriginal Tourism Association of British Columbia

The Aboriginal Tourism Association of British Columbia is a non-profit membership organization that offers training, information and research resources, networking opportunities and co-operative marketing programs. It is billed as a one-stop resource for Aboriginal entrepreneurs and communities in British Columbia.

- Members are first nations groups and tourism attractions, events, and organizations that they sponsor.
- The co-operating marketing program includes joint Internet marketing, quarterly consumer e-newsletters, media relations activities (press releases, etc.), a consumer website featuring all members, brochures and tour operator tariff and distribution, and overall joint advertising.
- Its partners include the Ministry of Tourism, Sports and the Arts, the First Nations Leadership Council, Four Host First Nations, Metis Nation of British Columbia, Tourism British Columbia, Indian and Northern Affairs Canada, Aboriginal Business Canada, Western Economic Diversification Canada, and VANOC (Vancouver Olympic Committee).
- The Association's Blue Print Strategy outlines long-term goals for marketing and collaborations to promote aboriginal tourism in the province.
Offers a comprehensive visitor's guide of aboriginal attractions including maps and directions.

⁶² <http://www.104.fr/en>

⁶³ Harris, Gareth "City Council Funds Fabrication of Contemporary Works of Art": The Art Newspaper, no 197, December 2008, p. 18

Recommendations for Linkages, Integration, Marketing and Positioning

1. **Create partner forums** that would provide education focusing on improving linkages and partner development. Jointly funded and executed by the Ministry of Tourism and Ministry of Culture, Ministry field representatives should determine the current status of linkages within a particular destination and those that require direction and encouragement become target communities for the Partner Forums. These should be done in partnership with the DMO and a lead cultural organization in each destination.
2. **Upgrading and enhancing cultural heritage sites.** If Ontario has a goal to appeal to and attract a growing number of 21st Century Travelers then attention must be given to improving existing assets within the province. Specifically, the focus must be directed at better understanding the deficiencies and then developing “prioritized” strategies to be put in place to improve the appeal of its culture and heritage assets.
3. **More support to field representatives** so that these tourism and culture experts can be more effective at better servicing the clients within their region to create linkages and partnerships.
4. **Funding for Cultural Tourism Development.** Rewards the development of distinct, creative and quality cultural tourism experiences through an attractive partnership funding formula that allows a larger number of destinations and cultural attractions to participate. Getting our innovative experiences to market is the challenge. This more generous funding strategy would ensure a greater number of experiences are presented to prospective cultural travelers and in turn increase the number of 21st Century Travelers who visit Ontario.
5. **Develop a web-based Creativity Portal** that brings together creative travelers and Ontario’s creative experiences. This will assist travelers to access experiences that have hitherto been seen as for a local market.
6. **Clustering Support:** Field representatives can support the industry to identify experiences to be clustered and packaged to the cultural traveler at the regional level.
7. **Improved collection and dissemination of Research:** The Ministry should review how current research such as TAMS, ITS and the new domestic travel survey can be better mined and cultivated to offer Ontario’s culture and heritage tourism stakeholders insight. In addition, research should be disseminated with more emphasis on the cultural tourism stakeholders—possibly as a road show or through on-going communication channels.
8. **Review of Market Segmentation (OTMPC)** against a goal of attracting the 21st Century Cultural Traveler. Consideration should be given to presenting product experiences that clearly support attracting customers interested in satisfying their need to experience leading edge innovation and creativity. If need be niche target communications should be considered. This includes both the messaging and media utilized.

Conclusion

Ontario is well positioned to capitalize on many of the trends that impact cultural tourism worldwide. Toronto, Ontario's capital city, is recognized as one of the top ten cities in the world for culture⁶⁴, yet Ontario's cultural experiences, on the whole, are under-performing in their capacity to draw the 21st Century Cultural traveler.

Ontario's challenge is to bring together a range of stakeholders – public and private, culture and tourism – to build on what currently exists and fill the gaps with high quality experiences. Like all good journeys, this one starts with research. Overall, there needs to be a better understanding by tourism stakeholders of Ontario's best future markets to be able to adequately respond to their needs. There is a need to think critically about how Ontario's tourism markets are segmented and measured in order to develop a more nuanced understanding of Ontario's core markets of the future and to have a pipeline of consumer-oriented information accessible to the cultural tourism sector and operators.

There is a need for the cultural sector and the tourism industry to recognize and embrace the changing needs of the cultural tourist in the 21st Century. This report makes the case that the traditional market of cultural tourists – those who travel wholly or in part for the purposes of experiencing arts, culture, and heritage – is being supplemented by new market segments who expect culture to provide a participative, creative, learning experience and who indeed expect to be able to construct and direct their tourism experiences. The consultants make a case for 'creative tourism' and a term that encompasses more accurately the blurring lines between pleasure and business and that of the '*cultural traveler*.'

This study advocates that the Ontario government embrace a new and exciting paradigm in cultural tourism. Enabling 21st Century Cultural Travelers to enjoy a range of creative experiences in Ontario takes a significant step towards positioning Ontario as a highly desirable cultural and creative destination. At the same time, supporting cultural institutions and events to deliver excellence in creativity, as well as in quality and distinctiveness, requires an on-going commitment from both the public and private sectors.

⁶⁴ Global Cities Index, 2008, Foreign Policy Magazine, A.T. Kearney, The Chicago Council on Global Affairs, November/December 2008, http://www.foreignpolicy.com/story/cms.php?story_id=4509

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Appendix A: Best Practices in Aboriginal Tourism

In a number of regions internationally, Aboriginal tourism presents authentic experiences to the cultural tourist that offer multiple layers of attractions and avenues for participation. The review suggests, some Aboriginal communities have needed to create organizational structure, and infrastructure to be able to transform their resources into tourism attractions. However, increasingly, with greater financial stability, stronger governance structures, and savvy entrepreneurs in Aboriginal communities, a full-scale tourist market has emerged to be both genuine and respectful in content as well as accessible and financial in structure.

The Canadian Tourism Commission's (CTC) 2008-12 plan has identified Aboriginal cultural tourism as one of six strategic issues. According to the CTC, it is clear there will be a different approach to Aboriginal tourism. The new approach "encourages travellers to come to Canada and create their own extra-ordinary stories; the reward for the trip to Canada is proof of a life less ordinary. Many of Canada's best target segments are learners and it for that reason we feel there is a natural fit between Canada's tourism brand and aboriginal cultural tourism experiences that can share stories, provide learning opportunities for travel, and certainly proof of a life less ordinary".⁶⁵

This aligns with the recommendations in the report – that Ontario invest in developing both its distinctive and creative cultural tourism offerings.

The following Best Practices provide some examples of how other jurisdictions are developing cultural tourism attractions based on Aboriginal culture.

NZ Maori Tourism Council, *New Zealand*

The NZ Maori Tourism Council, incorporating 13 Maori Regional Tourism Organisations (MRTOs) provides a mutually supportive network for the development of best practice by member MRTOs. The Council was established in August 2004 in an effort to lead to business growth and prosperity for the Maori in tourism. Members throughout the country collaborate on marketing, tourism campaigns and events, research, and advertising. The formation of this council is supported by government policy and programmes and is an important chapter in the implementation of the New Zealand Tourism Strategy (NZTS) 2010.

The Council sponsors annual conferences on marketing and tourism for local Maori tourism organizations. It also publishes a "Rough Guide to Maori NZ" that incorporates the attractions from around the nation. The Council is an effective advocate for marketing funding from the federal government. It is a centralized organization that has been successful in recruiting the talents of small Maori groups throughout the nation.

⁶⁵ "Moving Aboriginal experiences forward with Canada's tourism brand". Tourism Magazine, Vol. 005, Issue 04, April 2008, http://www.corporate.canada.travel/corp/media/app/en/ca/magazine/home.do?issuePath=templatedata%5Cctx%5CmagIssue%5Cdata%5C2008%5Cissue04%5Cissue2008_04

The Aboriginal Tourism Association of British Columbia (ATBC), British Columbia, Canada

The ATBC is a non-profit, membership-based organization that is committed to “growing and promoting a sustainable, culturally rich Aboriginal tourism industry”⁶⁶.

ATBC provides training, information resources, networking opportunities and co-operative marketing programs for Aboriginal entrepreneurs and communities in British Columbia who are operating or looking to start a tourism business. ATBC works closely with tourism, business, education and government organizations to help B.C.’s Aboriginal tourism businesses offer quality experiences and actively promotes these experiences to visitors and local residents.

To date, it has supported 200 businesses and is developing another 65⁶⁷.

In 2007 it put together a ‘Blueprint Strategy’ in order to provide a long-term plan for the sustainable growth and development of the province’s Aboriginal tourism industry. With the Blueprint Strategy in place, Aboriginal tourism is projected to grow by 10 per cent over the next five years, driving revenues to at least \$50 million by 2012, up from approximately \$35 million today.

Partners of the ATBC include First Nations Leadership Council, Four Host First Nations, Métis Nation of British Columbia, the B.C. Ministry of Tourism, Sport and the Arts, Tourism British Columbia, Indian and Northern Affairs Canada, Aboriginal Business Canada, Western Economic Diversification Canada, and VANOC.

Both the Aboriginal Tourism Association of British Columbia and the NZ Maori Tourism Council represents a model of centralized organization and entrepreneur support in Aboriginal tourism. Both use ‘economies of scale’ in marketing, branding, and advocacy in order to develop an Aboriginal experience (which may include a range of private sector initiatives) for the tourist.

⁶⁶ <http://www.aboriginalbc.com/trellis/aboutatbc>

⁶⁷ www.aboriginalbc.com

Grand Canyon Resort Corporation, Arizona, USA

The Grand Canyon Resort Corporation (GCRC) in northern Arizona, is owned and operated by the Hualapai tribe, who, in 1994, set up a development corporation run by professionals from the tribe. The Corporation is managed separately from the Tribal governance structures.

Through the Corporation, the Tribe operates five tourist-oriented businesses:

1. The Grand Canyon West and Skywalk. Grand Canyon West is a 9,000 acre development and is the only place in the Canyon where visitors can access the Colorado River. It is a 3-hour drive from Las Vegas (vs the Grand Canyon national park which is 5.5 hours away). The Grand Canyon Skywalk is a glass walkway 4000 ft above the canyon floor. Visitors can walk out onto the skywalk and peer down into the Grand Canyon. In addition, an Indian Village, located at Eagle Point adjacent to The Skywalk, will offer walking tours of authentic dwellings of the Hualapai, Havasupai, Navajo, Plains and Hopi Indians. Tribal members using materials from each individual reservation built the dwellings. Additional attractions within the village will include The Hualapai Market, which will feature handmade crafts and jewelry, and an amphitheatre with scheduled Native American cultural performances throughout the day. The \$30-million Skywalk was opened in March 2007 and financed by Las Vegas developer and tour operator David Jin. Initially, the tribe is to receive 75 percent of the revenues generated and Jin will get a 25 percent cut. The arrangement reportedly will switch to 100 percent of the revenues going to the Hualapai sometime in the future.⁶⁸
2. The Hualapai Lodge – a 60-roomed hotel with gift shop and restaurant

The Hualapai River Runners: this is a river-running enterprise catering to the summer-tourist market. Hualapai-guided raft trips carry visitors

1. Wild Life Hunting which sells hunting permits for bighorn sheep, elk, turkey, antelope and occasionally mountain lion. Hunts take place on the tribe's million-acre portion of the Reservation.
2. The Hualapai Arts and Crafts Enterprise which produces custom-designed t-shirts, hats and coffee mugs.

Since the building of the Skywalk, the northwest Arizona economy has surged—its opening quadrupled visitation to Grand Canyon West – from 500 per day to more than 2000 per day. It has reported about 500,000 visitors since it opened in 2007 (until April 2008) – 70% of these are foreigners who combine this trip with a Las Vegas vacation⁶⁹. Visitors typically spend about \$100-\$400 each a day. The attraction has 500 staff⁷⁰.

⁶⁸ Surreal Estate, March 27, 2007, http://www.usatoday.com/news/nation/2007-03-20-grand-canyon-skywalk_N.htm

http://www.irei.com/web/securedownload/Surreal_Estate_3-29-07.pdf?id=1668&file=Surreal_Estate_3-29-07.pdf

⁶⁹ "Has Grand Canyon Skywalk Helped the Hualapai?" by [Ted Robbins](#), April 25, 2008.

<http://www.npr.org/templates/story/story.php?storyId=89934206>

⁷⁰ Ibid.

Kuna Indians, San Blas Islands, Panama

The Kuna Indians of Panama are an indigenous group with autonomy over their native lands, located in the San Blas Archipelago (Kuna Yala) along Panama's northeast coast. After tourism to the islands excluded the Kuna from deriving financial benefit from hotels, tours, and packages, the tribal leaders won control over all tourist activities on the islands, from hotel operations to helicopter transportation to and from mainland Panama to the tours among the islands.

Currently, all tourist activity is governed by the General Kuna Congress through the Kuna General Congress Tourism Commission, which regulates the number of visitors to the island in an effort to preserve local culture and the environment. A share of the revenues of all tourist ventures must be given to the Kuna General Congress as well as to island councils.

The challenge has been developing a tourism industry for a group not equipped with the skills or financing devoted to this area. As a result, the Kuna have formed strategic alliances with the Panamanian Tourism Institute, various NGOs and multilateral organizations. Some of the principal accomplishments thus far include:

- Creation of a promotion and marketing system;
- Manual on solid waste management;
- Training 30 men and women to be ecotourism promoters;
- Management for ecotourism resources in Kuna Yala (main island); and
- Strategic plan for ecotourism development.

Ayres Rock (aka Uluru), Central Australia

Uluru is a sacred site to the Pitjantjatjara and Yankunytjatjara, the Aboriginal people of the area. It is an outdoor structure that features springs, waterholes, rock caves and ancient paintings. Uluru is listed as a World Heritage Site. The listing of Uluru – Kata Tjuta National Park ensures the Park remains a world class destination for both its cultural and natural heritage. A World Heritage Site designation has had a great impact on its attendance, last recorded in 2000 at 400,000 visitors.

In 1985 the freehold title of the land was given to the Anangu Aboriginal group organized under the Land Rights Movement. However, one of the conditions of the handover was that the park be leased back to Parks Australia (a government body) for 99 years. The Anangu receive an annual rent from this deal of \$150,000 and a quarter of park entrance fees

The site has been built into a full-scale educational and cultural attraction that includes a Cultural Centre, introducing visitors to *Tjukurpa* (law, knowledge, religion, philosophy), Anangu art, Anangu way of life (traditional and current), history, languages, wildlife and joint management of the Park; free Ranger guided walks as well as various guided walks.

Ayers Rock Resort is a commercial enterprise consisting of a variety of accommodation options including the five-star Sails in the Desert, the Desert Gardens Hotel, self contained apartments, a campground, campsites, and cabins. The Resort has undertaken a range of initiatives to ensure local Aboriginal communities share in the socio-economic benefits derived from tourists who visit Uluru-Kata Tjuta National Park⁷¹. As a result, the Mutitjulu Foundation was initiated which

⁷¹ HUNGRY JACK'S@ AUSTRALIAN TIDY TOWNS 2006, NORTH HERN TERRITORY, Yulara Ayers Rock Resort Northern Territory's Tidiest Town 2005 & National finalist 2006.

aims at improving health, advance education and relieve poverty of the Mutitjulu community. Nyangatjatjara College, Australia's first traditional independent indigenous high school, works in partnership with Ayers Rock Resort to enable effective work experience programs are initiated for mutual benefit.

The Hualapai tribe in northern Arizona, the Kuna Indians of Panama and Anangu Aboriginals each demonstrate ways in which indigenous groups can derive benefit over their resources. The Hualapai tribe created a professionally run corporation, wholly owned by the tribe, to conduct its tourism affairs. This corporation then engaged in a private-public partnership to develop the Grand Canyon. The Kuna General Congress Tourism Commission does not have such an arms-length relationship as the Grand Canyon Resort Corporation, however, it attempts to regulate tourism on the island for the benefit of the members of the tribe. In the case of the Anangu, they continue to own the land, but have leased it back to Parks Australia. Nevertheless, they are able to enter into private-public partnerships with the resort operators to ensure they are able to benefit from tourism to Ayers Rock.

The Native American Cultural and Education Authority, *Oklahoma City, Oklahoma*

In 1994, the Oklahoma Legislature created the Native American Cultural and Educational Authority, a state agency authorized to construct and operate the American Indian Cultural Center and Museum. The Authority has collaborated with tribal leaders and legislators to raise the funds for the museum. Funding for the museum is derived from both city and federal funds: \$63 million from city agencies and bonds and \$8.7 million from federal grants. The land is being donated by Oklahoma City.

The Native American Cultural Center and Museum (Cultural Center) is a 296 acre mixed-use development project in Oklahoma City, the capital of Oklahoma State. Upon completion (date has not yet been set), the project will include a cultural center and museum, as well as for-profit venues such as a shop for selling Native arts and crafts, a resort hotel and a conference center to attract business and leisure travelers.

Polynesian Cultural Center, *Oahu, Hawaii*

The Polynesian Cultural Center is a 42-acre facility on the North Shore of Oahu, Hawaii. The Centre was founded in 1963, by the Church of Jesus Christ of Latter-day Saints, so that the students of nearby Brigham Young University, Hawaii could work their way through college by sharing their island heritage with visitors. It employs about 1,300 employees representing the island people and nations of Hawaii, Samoa, Maori New Zealand (Aotearoa), Fiji, Tonga, Easter Island, Tahiti and the Marquesas (French Polynesia). It has not-for-profit status and all funds are used for its daily operations and to support its cultural and educational missions.

Many South Pacific nations are represented at the Polynesian Cultural Center, where recreated villages, exhibits and hands-on activities highlight eight of them. At the heart of the PCC experience are the island villages, which offer visitors a unique opportunity to learn about – and participate in – the customs of each island. Visitors are encouraged to take part in a number of authentic activities, representing everything from island games and crafts to food preparation and war training skills. An authentic Hawaiian luau, all-you-can-eat buffets, a canoe pageant, an IMAX™ theater, shops and the world's largest evening show are all part of the experience.

The Center features staged entertainment, foods, demonstrations of traditional skill sets, and crafts from a variety of native Polynesian groups represented throughout the Hawaiian Islands and neighbouring Polynesian territories.

The Center is the top-ranked paid attraction in Hawaii, with over 6.5 million visitors a year.

The Native American Cultural and Education Authority and the Polynesian Cultural Center show how government and a private non-profit entity (the Church of Jesus Christ of Latter-day Saints) have forged partnerships with Aboriginal communities in order to deliver a quality cultural tourism product.

National Museum of the American Indian, Washington, DC

Background: The National Museum of the American Indian (NMAI) is a Smithsonian Institution located on the National Mall which features objects, programs and cultural offerings that represent the Native American cultures indigenous to the United States.

As such, it is governed by a Board of Regents, a 17-member body, and issues semi-annual reports to the U.S. Congress and the Smithsonian Secretary. The design of the building and its surroundings was the result of four years of consultations with Native leaders. The enabling legislation for the museum mandated that the Board of Trustees shall consist of 23 members, of whom 12 must be Native people, in addition to the Smithsonian secretary and his/her designate. At the onset of the museum, the Native leaders were a critical component of collecting and presenting the collection in the galleries. Their decisions on how to represent their stories guided curators and museum leadership

Because of its membership among other Smithsonian Institutions, a government-sponsored band of museums, the NMAI represents a “cross-over” model of aboriginal tourism that presents Native content while adhering to the modes of marketing, staffing, governance, and funding that are typical of traditional museums.

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