

PACKAGING THE POTENTIAL



A FIVE-YEAR BUSINESS STRATEGY FOR CULTURAL AND HERITAGE TOURISM IN CANADA

The Cultural and Heritage Tourism Sub-Committee
Industry and Product Development Committee
Canadian Tourism Commission

December 1999



CANADIAN
TOURISM
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FOREWORD

The Canadian Tourism Commission (CTC) has identified culture in its broadest sense as a key component of the tourism industry. Both the vision and mission statements of the industry and of the CTC explicitly mention culture.

Vision

Canada will be the premier four-season destination to connect with nature and to experience diverse cultures and communities.

Mission

Canada's tourism industry will deliver world-class cultural and leisure experiences year round, while preserving and sharing Canada's clean, safe and natural environments. The industry will be guided by the values of respect, integrity and empathy.

In 1997, the Canadian Tourism Commission (CTC), in cooperation with the Department of Canadian Heritage, held a series of 6 regional roundtables across the country on cultural and heritage tourism, followed in 1998 by a “wrap-up” roundtable. These consultations identified a number of opportunities and issues for cultural and heritage tourism and the need for a concerted national effort to realize the potential offered.

This report is the work of the Sub-committee on Cultural and Heritage Tourism which was created to address these issues.

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EXECUTIVE SUMMARY

In the intensely competitive world of tourism, every country must develop its own unique products. Canada's culture and heritage has often been referred to as one of these unique products. However, little has been done to develop it, even though there is a wealth of products available, a growing demand and a high level of interest from both the cultural/heritage and tourism sectors.

Over the past few years, there has been a groundswell of activity in cultural and heritage tourism and several high-profile successes. It is now the right time to position culture and heritage as a key product line for Canada's tourism industry.

This business strategy proposes a five-year action plan to advance cultural and heritage tourism and focuses on five areas.

- Communications and Linkages
- Research
- Education and Training
- Product Development
- Marketing

The key recommendations are:

For everyone in both the cultural/heritage and tourism sectors:

- to increase communications, linkages, research and training about the opportunities, impacts and how-to's of cultural and heritage tourism.

For cultural and heritage organizations and tourism partners interested in cultural and heritage tourism:

- to focus on developing and packaging existing products.

For areas where there is a critical mass of market-ready products:

- to actively market culture and heritage products primarily in the domestic and US markets.

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INTRODUCTION

Canada is the world's 8th most popular tourist destination (1998 - World Tourism Organization). This is no small accomplishment in the fast-growing and fiercely competitive global tourism industry. But if Canada is to retain its ranking — and move up a rank — it must continue to develop its tourism product. Canada will always be a beautiful place to visit in the summer, but to be a top-ranking tourist destination it must have interesting and unique things to see and to do all year-round.

One of the key areas where Canada could do more to be competitive is in the line of cultural and heritage tourism. A major motivator of tourism is learning what is special about a place's culture and heritage. Cultural tourism is growing around the world and the trends point to increasing demand for these types of experiences.

For Canada, cultural and heritage tourism is a win-win situation offering opportunities to both the tourism industry and the culture and heritage sector.

For the tourism industry, cultural and heritage tourism offers an opportunity to:

- augment what there is for tourists to see and do in Canada
- offer tourists unique experiences which cannot be found elsewhere
- capitalize on market demand for quality cultural experiences and niche segments as learning travel
- overcome the challenges of seasonality

For the culture and heritage sector, tourism offers an opportunity to:

- increase audience size and revenues
- increase profile (hence more support and sponsorship)
- communicate Canadian culture and heritage to the world
- partner with others to reduce costs

Cultural tourism is not a new subject. Specific attention to this phenomenon has been growing consistently since the mid-eighties. Conferences, seminars, and campaigns around cultural tourism have taken place as the interest in cultural tourism has increased. Several provinces (Nova Scotia, Newfoundland, New Brunswick, Québec, Ontario, Saskatchewan and British Columbia) have developed strategies and initiatives devoted to this field.

Due to these efforts, there has been a significant increase in cultural and heritage tourism in Canada. There have been several high-profile successes in the past few years, especially in the area of blockbuster art exhibits, festivals and the performing arts. There have also been scores of smaller initiatives where culture and tourism have joined forces to create new packages and tourist experiences.

Yet there is a huge opportunity for cultural and heritage tourism that is largely untapped. There are thousands of quality museums, historic sites, performing arts companies, festivals, galleries and popular cultural events that can attract greater audiences. There are tour companies and regions looking for new products to offer to their markets. The question is how to bring these two spheres together and create a successful cultural tourism product line for Canada.

Defining Cultural and Heritage Tourism

There are as many definitions of cultural and heritage tourism as there are reports on the subject. Some definitions are very broad (e.g. any contact with the culture of a place during a trip), others more specific (e.g., a visit primarily motivated by a cultural activity).

For the purpose of the five-year strategy, the Sub-committee wished to have a definition of cultural and heritage tourism that would lend itself to measurement and evaluation. Therefore, for the purpose of this paper we will use the term as follows:

Cultural and heritage tourism occurs when participation in a cultural or heritage activity is a significant factor for travelling.

Principles of Cultural and Heritage Tourism

Cultural and heritage tourism involves a quality visitor encounter with a cultural or historic experience that is authentic and that is not created solely for the purpose of attracting tourists.

Cultural and heritage tourism must be sustainable and must ensure that the quality and integrity of the cultural or heritage resource / experience are conserved.

Cultural and heritage tourism is based on a mutually beneficial partnership between the culture/heritage and tourism sectors and must be a revenue-generator for both sectors.

What is included in Cultural and Heritage Tourism?

This business plan covers cultural and heritage tourism in a broad sense. The overall strategies and approaches are appropriate to all sectors that contribute to Canada's cultural richness and diversity. However, in order to have some focus, we will be specifically concerned with aspects of culture and heritage that create tourist products:

- Performing Arts (Theatre, Dance, Music)
- Visual Arts and Crafts
- Museums and Cultural Centres
- Historic Sites, Villages and Interpretive Centres
- Festivals

For the purpose of this strategy, natural heritage experiences, as well as sports and adventure tourism, are part of the eco-tourism offer — rather than part of the cultural tourism product line. This is not to imply that mixed packages (i.e. nature-culture) are not a strong product offer for Canada. However, they will not be the focus of this study.

Three areas are linked to cultural and heritage tourism and warrant special mention.

Aboriginal Tourism

Aboriginal tourism—a unique part of Canada's cultural heritage—is already the focus of *Aboriginal Tourism Team Canada*. While the strategies of this report do apply to aboriginal tourism, the special characteristics and markets for aboriginal tourism will be addressed by Aboriginal Tourism specialists.

Language Learning Tourism

The CTC recently conducted two pilot market-readiness seminars in Montréal and Vancouver on language learning tourism. These seminars have identified language schools as a major new partner in Canada's tourism product. While some of this plan applies to language learning tourism, the language school industry has markets, needs and characteristics that are different from other cultural tourism products and warrants its own strategy.

Culinary Tourism

Experiences such as wine tasting or discovering a region's unique dishes are very much part of cultural and heritage tourism. Not only does contact with distinctive foods and beverages deepen a tourist's understanding of Canada, it also has a natural affinity with arts and heritage discovery. However, gastronomic tourism, like language learning tourism, has distinct needs and will be considered by the CTC in a separate study.

SITUATIONAL ANALYSIS

A Growing Market Opportunity

Cultural tourism is growing around the world. Travellers everywhere are seeking out unique and diverse experiences that are authentic to the place they are visiting. The World Tourism Organization reported that 37% of all international trips include a cultural component and this market has been growing at the rate of 15% a year.

The market is expected to increase with aging populations of highly educated, well-travelled baby boomers. Learning travel is an important niche market among this audience.

Canadian cultural products have significant potential as a travel motivator. The reasons for this range from the generic fact that Canada is seen as a safe place to travel, with spectacular natural advantages, to its links with many countries via immigration, to the large public investment Canada has made in culture. There is reason to believe that Canada's cultural and heritage offerings can compare equally to those offered anywhere else in the world for travellers interested in learning about another place.

A Solid Product Base

Canada has a tremendous wealth of quality cultural and heritage experiences. It is estimated that there are about 500 non-profit performing arts companies and thousands of heritage institutions and festivals.

There are also outstanding cultural and heritage experiences to be had in every part of Canada; from historic downtowns and lowertowns areas of many cities to the Viking settlement *L'Anse-aux-Meadows* in Newfoundland to the famous Haida totems of *Gwaii Haanas* in British Columbia to the Klondike gold miners' *Chilkoot Trail* in the Yukon.

There is a tremendous range in the types of experiences available. There are fabulous festivals (e.g., Festival du Jazz de Montréal, Folkorama in Winnipeg), significant art collections (e.g., the National Gallery of Canada, the McMichael Canadian Collection), world-class performing arts (e.g., Montréal, Toronto and Vancouver), specialized theatre seasons (e.g. Charlottetown Festival, the Shaw Festival), wonderful Museums (e.g., UBC Museum of Anthropology, Musée de la civilisation du Québec, the Tyrell Museum), outstanding historic sites (Village historique acadien, Fortress of Louisbourg) and aboriginal products (Wanuskewin, Sask.; Duncan, B.C.) just to name a few.

This country's two official languages and diversity of cultures add to Canada appeal to visitors.

A Competitive Challenge

In terms of existing global cultural tourism, Canada is at a disadvantage.

Cultural tourism began in Europe. European cities are major competitors in terms of facilities (historic architecture, museums, galleries, performing arts) and overall image as a cultural destination. France, Italy and Greece are synonymous with cultural tourism.

The United States is also ahead of Canada. The performing arts, art collections, major museums and well-known historic sites are strong in the U.S. and there is a large population that is knowledgeable about what is offered. When the world thinks of North American culture, it often tends to think of New York, Los Angeles or Chicago.

Canada faces many challenges:

- Few Canadians are aware of Canada's cultural and heritage offerings. How many have visited the Irish memorial at Grosse-Île in Québec? How many are aware that Lunenburg, Nova Scotia, and Head-Smashed-In Buffalo Jump, Alberta, have been designated world heritage sites? How many Canadians have seen the Chemainus murals in British Columbia?
- Canada has, for the most part, marketed itself as a natural and recreational destination and downplayed urban and cultural attractions.

Barriers to Growth

- The following barriers to the development of cultural and heritage tourism in Canada were identified during the roundtable process:
- Mutual lack of knowledge between the cultural/heritage and tourism sectors and about the opportunities of cultural and heritage tourism.
- Lack of formal linkages between culture and tourism at government and working levels.
- Cultural and Heritage ambivalence about tourism given concerns about sustainability and commercialism.
- Lack of knowledge about the economic impact of Cultural and Heritage Tourism.
- Lack of resources to develop and market cultural and heritage products.
- Lack of education and training related to cultural and heritage tourism.
- Distance and access problems outside the major urban areas.
- Lack of market-ready, packaged product (outside the major urban centres).
- Minimal marketing of culture and heritage.

In addition to these specific barriers, Canada faces the challenge that the infrastructure of cultural facilities, an area of considerable investment during the sixties and seventies, has been subject to significant government sector cut-backs affecting both physical and human resources. Without some focused initiative, the cultural tourism marketplace in Canada could actually lose the level of activity currently taking place.

Stakeholders

There are many players who must work together to develop cultural tourism in Canada. These include public and private sector players from both the tourist industry and the cultural and heritage sector.

Governments

Federal

Industry Canada: The Canadian Tourism Commission
Department of Canadian Heritage
Parks Canada
Attractions Canada
Department of Foreign Affairs and International Trade
National cultural agencies (e.g. Canada Council)
Regional Development Corporations (ACOA, WDC etc.)

Provincial

Departments responsible for culture and heritage
Departments responsible for tourism
Departments responsible for economic development
Departments responsible for education

Municipal

Departments responsible for economic development
Departments responsible for tourism
Departments responsible for culture and heritage

Tourism Industry

Tourism Industry Association of Canada
Hotel Association of Canada and other accommodation associations
Travel Agents
Private sector wholesalers, operators, receptives and cultural package specialists
Transportation Companies (Airlines, Via Rail, Car Rentals, Motorcoach)
Destination Marketing Organizations
Canadian Tourism Human Resources Council
Aboriginal Tourism Team Canada

Cultural and Heritage Sector Products

Products

National institutions/organizations (National Museums, National Arts Centre, National Historic Sites etc.)
Provincial institutions/organizations (Provincial Museums, Historic Sites, etc.)
Municipal institutions/organizations
Private institutions/organizations
Non-profit institutions/organizations

Associations

Canadian Museums Association
Heritage Canada
Canadian Arts Presenting Organization
Canadian Conference of the Arts
Cultural Human Resources Council
Professional Association of Canadian Theatres
Provincial and regional arts councils
Provincial and regional museums associations
Provincial and regional festival associations

Other

Travel media

Target Markets

The target market for Canadian culture and heritage is ultimately the world. However, it would be wise to begin close to home in our most major markets.

For the next five years, the priority audiences are:

- Canadians traveling within Canada
- Americans traveling to Canada (14.9 million in 1998)

Culture and heritage should be included in key overseas markets (UK, France, Germany and Japan) as part of a long term effort.

The most likely people to be travelling to cultural sites are seen as retirees and aging baby-boomers who have the time, money and increasing interest in the past and in how other people live. They may be coming for intense weekend getaways, but some may also likely be coming for more committed experiences of seven to fourteen days or more.

Within this broad profile of travellers motivated by the desire to be exposed to and understand different cultural experiences are distinct sub-segments which cannot be ignored. These include 'learning travellers' who may have a very focused agenda.

Best Practices

A recurring theme in strengthening cultural tourism is the lack of appreciation of the success and potential of cultural tourism. One of the best ways to both promote and develop cultural tourism is to illustrate how it can become a success for both sectors. Documenting and promoting best practices is an obvious method of doing this.

People in tourism and culture need to become aware of and act upon examples of best practices as appropriate to their organization. These include such things as the successes of major art exhibits (galleries, museums), of major festivals, and distinct micro-products for niche segments. Based on the promise of success that these examples demonstrate and the lessons learned, cultural organizations can be assisted in providing effective offerings and travel operators can be stimulated to add the cultural dimension to their packages.

Examples of best practices include:

- Montréal's Museums Pass and other joint marketing ventures.
- Vancouver's Entertainment Season.
- Innovative partnering (McMichael Collection with Algonquin Park Outfitters; the National Gallery of Canada with the Casino de Hull).
- Blockbuster exhibits (Barnes, Renoir, Rodin, Leonardo da Vinci, Monet).
- Festivals: Festival international d'été de Québec, Festival des voyageurs (Winnipeg).
- The Village Historique Acadien's future expansion into a four-season site.
- Signature theatre festivals (e.g., Charlottetown's Anne of Green Gables, the Shaw Festival - American Bus Association's award of the best Canadian event (2000).
- The 1999 Learning Travel Forum where cultural packagers, a destination marketing organization and cultural organizations mounted a specialized educational visit for US learning travel specialists.

GOALS AND OBJECTIVES FOR THE BUSINESS STRATEGY

Overall Goal

By the year 2005, cultural and heritage tourism will be a key product line for Canada as demonstrated by:

- a 20% increase in the number of packages offering cultural and heritage experiences
- a 20% increase in revenues and attendance for both sectors as measured by a selected set of pilot projects and indicators
- 20% of Canadian tourism marketing in the domestic and US markets will feature culture and heritage products

Objectives

By the end of 2005, Canada will have:

- established the importance, nationally and internationally, of cultural and heritage tourism as a key Canadian product line in the minds of consumers, the tourism industry, cultural organizations, the media and all levels of government
- developed more quality cultural and heritage products to the point where they are nationally and internationally market-ready
- integrated culture and heritage into the day-to-day planning, marketing and operations of the tourism industry

Planning Approach

In developing this plan, the Sub-committee was aware of the danger of proposing a strategy that would lead only to more study. The strategic directions and actions proposed are based on the following premises:

- It is important that actions of the Strategy be implemented within a relatively short time frame in order to create confidence that something is being accomplished and to create momentum which will inspire stakeholders to take action.
- The plan must be focused in terms of what it tries to do so that it can achieve results. It should focus on a small number of initiatives, primarily in the domestic and US markets.

¹ We propose this number subject to review in year 1 following development of an evaluation framework.

Action needs to be taken simultaneously at three levels:

1. All cultural and heritage organizations and the tourism industry as a whole (Communications & Linkages, Research, Training).
2. Organizations in both sectors that are already interested in cultural and heritage tourism (Product Development).
3. Products and packages that are currently nationally and internationally market and export-ready (Marketing).

Strategic Directions

To achieve these goals and objectives, this plan outlines actions in 5 areas:

- *Communications and Linkages*
- *Research*
- *Education and Training*
- *Product Development*
- *Marketing*

STRATEGY 1 - COMMUNICATIONS AND LINKAGES

Issues

- There is a crucial lack of understanding and information sharing between the cultural/heritage and tourism sectors.
- There are few formal, ongoing linkages between the sectors.

Objective for 2005

By 2005... there should be effective communication mechanisms and business linkages in place within and between the cultural/heritage and tourism sectors and an increased amount of ongoing information flow between the sectors.

Strategies and actions

1.1. Develop information materials on cultural and heritage tourism and distribute these through existing industry channels and the Internet.

- Produce a series of fact sheets and articles about cultural and heritage tourism highlighting economic impacts, best practices and how-to's and distribute these through existing cultural/heritage and tourism industry professional associations and publications (e.g., TIAC, ACTA, museums associations, arts councils, Aboriginal Tourism Team Canada, etc.).
- Use technology as a way to easily communicate materials to all parts of the country. Set- up a cultural and heritage tourism section on the CTX and other industry web-sites with information on 'how-tos', packages, offerings, economic impacts and ensure it is hot-linked with the sites of relevant organizations.
- Launch a regular column on cultural and heritage tourism in Communiqué to highlight the CTC's and partners' support of this product line. Make these columns available to other organizations' newsletters.
- Make existing documents on cultural/heritage tourism (for example, "Culture et Tourisme: une affaire de créativité", Montréal-1998) readily available through the CTC's web site and resource centre.

1.2. Create formal linkages between the two sectors.

- Hold an annual joint meeting between the Federal and Provincial/Territorial Ministers responsible for culture and for tourism.

- Enhance linkages at the federal level between the CTC and PCH (Department of Canadian Heritage) by such means as semi-annual meetings between senior officials (VP/DG level) or by an annual meeting bringing together PCH regional representatives for a meeting with the CTC staff.
- Hold an annual meeting(s) of key players in cultural and heritage tourism (similar to the national/regional roundtables) timed in conjunction with industry events and conferences.
- Enhance cultural and heritage expertise on federal and provincial tourism marketing committees (e.g. nominate culture sector experts to marketing committees; brief marketing committees on culture/heritage success stories and upcoming events).
- Enhance tourism expertise in cultural and heritage organizations (e.g., bring tourism experts to cultural boards, have the CTC staff advise on PCH projects when appropriate).
- Establish a network of cultural and heritage tourism stakeholders and professionals on the Internet to share information and news.
- Encourage the creation of cultural and heritage tourism special interest groups within existing professional associations.

1.3. Foster connections at a local and regional level through Destination Marketing Organizations (DMO's).

- Encourage cultural and heritage organizations to join DMO's (for example: by highlighting the importance of DMO's in communications materials) as a way to be part of the tourism industry.
- Encourage DMO's to host events around the cultural and heritage tourism theme: launching this plan, highlighting cultural and heritage tourism offerings in their regions, and reporting on local successes and opportunities.
- Communicate to DMO's across the country examples of what DMO's can do to promote cultural and heritage tourism (e.g., Tourisme Montréal has hired an expert that provided advice to cultural organizations; Ottawa Tourism cooperated with cultural travel packagers on the Learning Travel Forum).

1.4. Communicate to governments the importance of cultural and heritage tourism.

- Convince federal, provincial / territorial governments and regional development agencies to continue investing in cultural and heritage assets not only for cultural development but also as a tourism investment and as an investment in employment and skills.
- Use economic impact studies and other data to communicate to governments how fiscally relevant it is for them to keep investing in cultural and heritage assets, given the tax revenues generated by cultural and heritage tourism.

1.5. *Facilitate meetings between the two sectors.*

- Support organizations or businesses (e.g. cultural tourism packagers) that hold conferences, meetings, seminars or events on cultural and heritage tourism.
- Organize one major cultural and heritage tourism colloquium within 5 years.
- Stage specialized cultural and heritage tourism marketplaces (see strategy #5).

STRATEGY 2 - RESEARCH

Issues

Although there are many research studies on various aspects of cultural and heritage tourism available, there is still no detailed data available on:

- Benchmarks and indicators to measure performance.
- The cultural tourist market (segments, characteristics, motivation, needs, numbers, niches).
- Best practices in cultural and heritage tourism.
- The composition of the cultural and heritage tourism industry (operators, products).
- Overall economic impact (including employment).

No organization has a mandate to collect and analyze cultural and heritage tourism data and communicate findings.

Objectives for 2005

By 2005... there will be accurate sets of data relating to cultural and heritage tourism available and used by the industry.

Strategies and actions

2.1. Develop benchmarks and performance indicators.

- Develop an evaluation framework of performance indicators for cultural and heritage tourism.

2.2. Carry out economic impact studies for a number of pilot projects.

- Set up a research program on a small number of case studies which represent different aspects of the industry (e.g., selection should cover large/small projects; urban/rural; different regions; various aspects such as performing arts, festivals, galleries, museums, historic sites, cultural corridors, etc.) and track these over a five-year period as powerful illustrations of the business case for cultural and heritage tourism.

2.3. *Analyze, synthesize and communicate data.*

- Collect data from and analyze existing surveys and studies on:
 - cultural tourism market segments, characteristics and trends
 - economic impact of blockbusters (Barnes, Renoir, Rodin, Da Vinci etc.).
 - economic impact of cultural tourism (other than blockbusters) at local, provincial/territorial and national levels
 - best practices
 - competition from other destinations, especially from the US
 - the size and characteristics of the labour market and detailed training needs
- Produce and disseminate credible, informed highlights of this research on the web and in a user-friendly print or video format with quotes, graphs, pictures etc., that can be used for business planning, marketing, advocacy, sponsorship and training, as well as for media relations.
- Develop new sources of data.

2.4. *Create a mechanism for long-term research and data collection.*

- Identify means to consistently collect, analyze and communicate data on cultural and heritage tourism nationally via Statistics Canada and the Canadian Tourism Commission.
- Develop standard methods for individual organizations to collect research data to ensure different studies are comparable (e.g., *TEAM model* for art galleries or the *festivals model* for events or a *core set of questions* for any survey).
- Encourage the two human resource sector councils (CHRC, CTHRC) to share the same methodologies for labour market research.

STRATEGY 3 - EDUCATION AND TRAINING

Issues

Lack of human resource expertise and knowledge about cultural and heritage tourism

Objective for 2005

By 2005... an effective and coordinated system should be in place to deliver required training and related programs to both sectors.

Strategies and actions

3.1. Develop pilot programs on cultural and heritage tourism.

- Continue to offer a limited number of pilot workshops on topics such as market-readiness and packaging to develop training and partnership building between the two sectors. (CTHRC & CTC have materials; CTHRC/CHRC could provide delivery mechanisms).
- Identify international training best practices in cultural and heritage tourism (e.g. Israel).
- Identify organizations (e.g. DMO's, Human Resource Councils, professional associations) which can develop and deliver programs on an ongoing basis.

3.2. Promote a partnership between the Cultural Human Resources Council and the Canadian Tourism Human Resources Council to develop, adapt and deliver programs to train workers in both sectors about cultural and heritage tourism. The following topic areas are recommended:

- Tourism distribution system (including pricing/commissions).
- Cultural and heritage program planning and development for a tourism market (market-readiness/packaging/animation).
- Business planning for cultural and heritage tourism products.
- Hospitality/service excellence.
- Enhanced product knowledge (cultural heritage organizations and their role/contribution to product offering; national, regional and local cultural and heritage product offerings).
- Conservation, preservation and sustainable use of cultural resources in light of cultural and heritage tourism.

3.3. *Work with the human resource councils to develop technology-based delivery mechanisms for training programs that promote self-study and workplace-based learning.*

3.4. *Promote the bridging of tourism and culture/heritage programs at the post-secondary level. Thus, incorporating cultural and heritage tourism into both types of programs.*

- Approach two institutions, one offering a cultural program and one offering a tourism program (e.g. Banff Centre for the Arts and the University of Calgary, or the Université du Québec à Montréal and the Université de Montréal) to test an integrated program.
- Assess the current teaching of cultural and heritage tourism within existing cultural and tourism education programs.

STRATEGY 4 - PRODUCT DEVELOPMENT

Issues

- While there are many market-ready cultural and heritage products of international caliber in major urban areas, there are other areas where product development is needed.
- There are hundreds of existing quality cultural and heritage products which need enhancement to meet the needs and expectations of tourist markets.

Objective for 2005

By 2005... the criteria for market-readiness will be widely understood in the cultural sector and 20% more market-ready cultural products will be available for the local, national and international markets.

Strategies and actions

4.1. Develop and distribute market-readiness tools.

- Draw on work already done in cultural and heritage tourism and market-readiness seminars to develop criteria for market-readiness.
- Develop this into a “tool kit” and make it available across Canada.

4.2. Evaluate feasibility of an accreditation system.

- Study effectiveness and applicability of different types of rating or accreditation systems along the lines of New Brunswick’s model or of the “Canada Select” or “Child and Youth Friendly” ratings. These will inform tourists and the tourism industry about facilities and level of readiness of cultural and heritage sites.

4.3. Focus on packaging and enhancement of existing products.

- Foster the packaging of existing market-ready or near-ready products into cultural corridors, themed packages and mixed packages (e.g., nature-culture) which have greater tourism appeal than stand-alone products.
- Promote the ‘animation’ of cultural and heritage sites to provide more meaningful experiences for tourists.
- Foster the development of quality themed retail services (e.g., boutiques, food services, and promotional items) that enhance the overall cultural experience.

- Select a small number of existing products as case studies that will receive support for development and packaging as part of this five-year plan.

4.4. Produce tools to facilitate partnerships and packaging.

- Produce a catalogue of cultural and heritage offerings deemed to be market-ready. It is recommended that this be done on a regional basis using a format developed in conjunction with the travel trade. Make this available on the Internet and other means.
- Establish a list of tour operators, receptives, travel agents, cultural packagers who are interested in this sector. Also provide it on the web.
- Identify a mechanism to regularly update lists of market-ready products and interested tourism partners.

4.5. Inspire by example.

- Develop partnering programs between successful and emerging products.
- Promote coverage of success stories in travel media, industry publications and in training programs.
- Honour and publicize product development and packaging successes through existing award programs (for example: publicize winners in the media or encourage creation of cultural and heritage tourism categories in existing award programs).

4.6. Find financing solutions to fund product development.

- Work with federal, provincial/territorial and regional funding organizations to include cultural and heritage tourism projects within their criteria.
- Encourage cultural and heritage products to develop more effective pricing structures and work with industry associations to develop more consistent and rational pricing structures.
- Synthesize and communicate information on the economic impact of cultural and heritage tourism so that sites can develop their own business plans to finance product development.

STRATEGY 5 - MARKETING

Issues:

- Culture, even products of the highest quality, is rarely marketed effectively as part of Canada's tourism offer.
- There is no brand image for Canada as a cultural destination.
- Small to medium-size enterprises, and even large cultural organizations, lack appropriate marketplaces and marketing opportunities.

Objectives for 2005

By 2005, cultural experiences will be fully integrated into the mix of products and experiences marketed in the domestic, US and international markets so that 20% of all marketing activities relate to culture and heritage.

Strategies and actions

5.1. Target the US and domestic markets as priorities. Develop national and regional brand images for Canadian cultural and heritage.

- Integrate cultural and heritage tourism as a key product line into CTC marketing activities in the US.
- Integrate cultural and heritage tourism into provincial tourism marketing campaigns.
- Set targets for cultural and heritage presence in promotional materials.
- Integrate cultural and heritage experiences into marketing campaigns for the other key international markets of UK, France, Germany and Japan.

5.2. Develop national and regional brand images for Canadian cultural and heritage experiences.

- Include cultural and heritage experts on marketing committees to promote effective branding of Canada and of its regions for culture and heritage.
- Exercise sensitivity in branding cultural experiences, by working with the groups and products concerned.

5.3. As a first priority, focus marketing efforts on quality, market-ready cultural/heritage experiences that are ongoing rather than one-time events.

- Prepare a marketing strategy for a campaign which positions Canada as a quality cultural and heritage tourism destination 365 days a year.
- Launch campaign, focusing on marketing areas where there is a critical mass of easily-accessible, market-ready cultural and heritage products.
- Market cultural corridors as a way to bring consumer awareness to smaller cultural and heritage products.
- Target guide book producers as allies in promoting cultural and heritage tourism.

5.4. Take advantage of special events to enhance the profile of cultural and heritage tourism.

- Develop a 3-5 year schedule of major cultural and heritage opportunities (e.g., Vikings in 2000, Ste-Croix Island in 2004) and assess whether these events can be effectively leveraged for cultural and heritage tourism marketing.
- Scan popular culture for marketing hooks that can attract attention to Canadian cultural and heritage experiences (e.g., the Titanic exhibit at the Maritime Museum of the Atlantic/Halifax graveyard tours).

5.5. Raise the profile of cultural tourism in tourism marketplaces.

- Encourage key players to highlight cultural and heritage products at Rendez-Vous Canada and include cultural performances as part of program of activities at these events.
- Organize a specialized marketplace for cultural and heritage tourism.
- Create annual regional and niche marketplaces for smaller, emerging and specialized products.

5.6. Challenge DMOs to take the lead in cultural and heritage tourism marketing so that resources from cultural and heritage products are pooled more effectively.

- To reduce the amount of money invested by cultural groups in promotional tools (individual site brochures, ads, marketplace displays etc.), call on DMO's to take the lead in marketing regions.

CONCLUSION

Cultural and heritage tourism presents an enormous opportunity for the tourism industry, for cultural and heritage organizations and for Canada as a whole. It is important to move from talking about this potential, to acting upon it.

This Business Strategy is derived from several years of activity and study on a federal, provincial/territorial, municipal and international basis. It responds to identified issues in an incremental fashion and has the potential to make significant contributions to tourism, to cultural organizations and to the Canadian public as well.

If the strategic orientations described here were to be implemented, we would undoubtedly observe in the coming years a significant measurable increase in revenues attributed to cultural and heritage tourism. Canada would then have a stronger cultural and heritage sector and a more competitive tourism industry; everyone would benefit.

The various components of this Business Strategy will require a concerted and coordinated effort on the part of the culture and heritage sector and of all levels of government. It is evident that the tourism industry has a key role to play. In this perspective, the Canadian Tourism Commission will continue to encourage in several ways the growth of cultural and heritage tourism. It will identify initiatives to be launched on a priority basis. The CTC will also promote the creation of strong partnerships, a key to the success of this endeavor.