

Highlights of the ***Ontario Cultural and Heritage Tourism Product Research Paper***, commissioned by the Ontario Ministry of Tourism and prepared by Lord Cultural Resources, February 2009

- Examines the current trends in cultural tourism, best practices and lessons for Ontario, rates Ontario cultural attractions, identifies gaps and opportunities
- Presents a strategic framework for attracting a greater number of cultural tourists in the 21st century focusing on experiences
- Analyses linkages and how to integrate and market cultural attractions
- Approx. 60 pp with an appendix on Best Practices in Aboriginal Tourism
- Key starting points: “Think big, bold, outside the box” and “Build on Ontario’s creative environment, diverse cultures, skilled workforce, etc”
- Findings:
 - “Cultural tourists” are seekers of experience in performing arts, visual arts and crafts, museums, cultural centres, historic sites, interpretive centres, cultural industries, cultural events
 - 25 % of all tourists to Ontario travel wholly or in part for arts and culture
 - Many more take in a cultural event even if their trip is not for that reason
 - Over 50 % of US market visits a historic site, museum or art gallery
 - Cultural tourism is a destination motivator and destination enhancer
 - “Cultural Tourist” – highly motivated, looking for meaningful personal experience, likes to explore and usually stays overnight, seeks a total experience including landscapes, is motivated by festivals, big events, or blockbusters, cares about environmental and cultural sustainability, takes frequent short trips not one long one, uses the Internet to plan travel, is any age, has a higher educational level, spends more money than average
 - Trends: new and emerging markets like **Mexico, China, India**; travel is a way for the creative class to enhance professional development; Gen Y travellers create their own travel products and participate in their own experiences; destinations need to give a range of experiences to attract visitors; large attractions must compete on excellence not cost (value for time)
 - Key Observations of other countries’ tourism offers: time-specific, festival events that attract top quality professionals and lots of media interest help build longer-term cultural experiences with adjacent experiences clustered around the event; big names who participate indicate the quality of the

event and attract more cultural tourists; time-pressed tourists appreciate 'clustering' to justify the time they spend there, e.g. The Distillery District; same principle is true of events-based strategies like art fairs, festivals, etc.; 'creativity tourism' offers the chance to develop one's creative potential through active participation in courses, learning experiences, workshops and seminars while visiting – a growth area; Aboriginal tourism is still a growth area

- Gaps: Ontario's cultural attractions do not have good brand recognition; cultural attractions do not offer distinctive experiences; do not give a full range of experiences from consumption to creative participation; do not appeal to the emerging market of diverse peoples visiting friends and relatives in Ontario; time-limited events are not well-marketed; most cultural attractions are in Toronto and Ottawa not spread around
- Decision factors for cultural tourists: the quality of the experience is # 1 motivator; brand signifiers like TIFF, Louvre, etc are important; distinctive attractions combine scale, authenticity, unusual settings or designs, are time bound and prestigious (therefore, existing cultural attractions can add new and more creative attractions to become more distinctive); creativity means engaging the visitor in constructing his/her experience, learning through courses, studio work, etc, personal and professional growth; **experiences must be of high quality, be highly distinctive, and highly creative and supported by sufficient infrastructure**
- Currently in Ontario: few municipal cultural entities attract such travellers; cities can be successful at attracting them with "Festivals and Events"; smaller historic sites and smaller volunteer-based organizations are not well-suited to this new market working alone; need to jointly market destinations by creating packages and linkages (eg hotel, show or event, tour, cultural performance), summer theatre tours with dining, etc; 'clustering' experiences is a way to attract travel to an area, and tell the story of a geographic area or of a people
- Best practices: cultural access passes, coalitions for arts and culture, blockbuster exhibitions, using the Internet to communicate including social media, partnering forums, upgrading sites, clustering when possible.

Further information and the full report can be obtained by contacting the Ministry of Tourism or by linking to Lord Cultural Resources by email at news@lord.ca . National Historic Sites Alliance for Ontario also has a PDF version of the report available by email at NHSAO@ontario.ca .