



CULTURAL TOURISM

Cultural tourism focuses on the distinct culture of a destination - its lifestyle, heritage, arts, people and industries - and the business of providing and interpreting that culture to visitors

In September 2003 Tourism Queensland conducted a review of current research to gain a better understanding of the Cultural Tourism market. Specific objectives of conducting the review were to:

- Develop a market profile of the cultural tourism sector in Queensland;
- Provide information on what people are looking for in a cultural tourism experience;
- Identify any product gaps; and
- Identify core issues that confront both the operation and development of cultural tourism businesses.

1.1 Market Insight

- Cultural tourism is a rapidly growing industry, with a significant proportion of domestic and international visitors to Australia looking to participate in cultural experiences as a key element of their holidays.
- Cultural industries injected almost \$12 billion into the Australian economy and employed 85,000 people in the 12 months ended June 2000.ⁱ
- Eighty-five percent (85%) of the Australian population aged 15 years and over had attended at least one cultural venue or participated in at least one cultural activity in the 12 months ended April 1999.ⁱⁱ
- Fifty percent (50%) of Australians experienced the performing arts (popular and classical music, theatre, dance, opera, musicals, other performing arts) at least once in the 12 months ended April 1999, while 51% visited an art gallery, museum or library.ⁱⁱ
- There were 1,353,000 domestic cultural visitors (visitors who participated in at least one cultural activity on their trip) to Queensland in the year ended December 2002.ⁱⁱⁱ
- Cultural visitors spent 8,018,000 domestic visitor nights in Queensland in the year ended December 2002.ⁱⁱⁱ
- There were 945,673 international cultural visitors to Queensland in the year ended December 2002, representing 50% of all international visitors to the state.^{iv}
- Cultural visitors spent 14,015,435 international visitor nights in Queensland in the year ended December 2002.^{iv}
- The majority of overseas cultural visitors to Queensland are from Europe, Japan, the United States of America and New Zealand.^{iv}
- Female visitors were more likely to participate in cultural activities than males.ⁱⁱⁱ
- Cultural visitors from overseas spend approximately 20% more in Australia (\$2,230 per stay) than overseas visitors generally (\$1,920 per stay).^v
- Cultural visitors tend to be younger than inbound visitors generally and will stay in Australia longer.^v
- The main motivating factor for international cultural visitors in visiting a cultural attraction was a desire to experience something Australian.^v
- Fifty-nine percent (59%) of international cultural visitors had not planned their visit to a cultural attraction in Australia beforehand.^v

1.2 Type of Experience Sought

- Cultural tourists want to see and learn about the qualities and experiences that make Australia unique.^v
- Cultural tourists are interested in experiencing the different ways of life of other people and gaining an understanding of their customs, traditions, the physical environment, the intellectual ideas and those places of architectural, historical, archaeological or other cultural significance.^{vi}
- International cultural visitors identified the following as motivations to visit cultural attractions:^v
 - A desire to experience something Australian
 - Specifically wanted to visit
 - Part of package tour
 - A desire to experience something new
 - An educational experience
 - Interested & spend time with friends/relatives
 - Authentic experience
- The strongest motivations for visiting cultural attractions varied by *country of origin*:^v
 - European and North American visitors wanted to have an Australian experience
 - Asian visitors visited cultural attractions as part of a package tour
 - New Zealand visitors specifically wanted to visit an attraction or performance.

1.3 Activities^v

Activities undertaken by a cultural visitor may include:

- Festivals or fairs (music, dance, comedy, visual arts, multi-arts and heritage);
- Performing arts or concerts (theatre, opera, ballet, classical and contemporary music);
- Museums or art galleries;
- Historic or heritage buildings, sites, monuments;
- Art or craft workshops or studios; or
- Aboriginal sites and cultural displays.

1.4 Accommodation Preferences

- The most common forms of accommodation used by domestic cultural visitors to Queensland are:ⁱⁱⁱ
 - Hotel, resort, motel or motor inn 35%
 - Friend or relative's property 30%
 - Rented house, apartment, unit or flat 15%
 - Caravan park or commercial camping ground 12%
- The most common forms of accommodation used by international cultural visitors to Queensland are:^{iv}
 - Hotel, resort, motel or motor inn 64%
 - Backpacker hostel 18%
 - Home of friend or relative 18%

1.5 Transportⁱⁱⁱ

Privately owned vehicles are the most common form of transport used by domestic cultural visitors to Queensland. The second most common form of transport is an aircraft.

1.6 Travel Party

Cultural visitors generally travel without children.

Domestic cultural visitors to Queensland most commonly travel as: ⁱⁱⁱ

- An adult couple 40%
- A family group 24%
- Friends or relatives travelling without children 16%

International cultural visitors to Queensland most commonly travel as: ^{iv}

- An adult couple 39%
- An unaccompanied traveller 36%

1.7 Information Sources

The most common information sources used by domestic cultural visitors when planning their trips are: ⁱⁱⁱ

- Internet
- Tourist office or visitor information centre or government tourism commission
- Travel agent

International cultural visitors most commonly source information about cultural attractions and events from the following places when planning their holiday: ^v

- Travel brochures and travel agencies
- Word of mouth
- Guidebooks and travel magazines
- Advertising
- Books and other literature
- Films and documentaries.

The types of information sources used varied depending on *the type of cultural attraction or event visited*: ^v

- Visitors to Aboriginal sites or cultural displays were most likely to be influenced by films or documentaries and books and other literature.
- Visitors to art or craft workshops and to museums and galleries were likely to be influenced through word of mouth and information gathered from travel brochures and travel agents
- Visitors to festivals or fairs and to performing arts or concerts were most likely to be influenced by word of mouth or advertising.
- Visitors to historic or heritage buildings, sites or monuments used a variety of sources of information when planning their visit to a cultural attraction or event.

1.8 Length of Experience

- Domestic visitors who engaged in cultural activities stayed for an average of 5.9 nights in Queensland in the year ended December 2002. In comparison, the average length of stay for all domestic visitors in the year ended December 2002 was 4.7 nights. ⁱⁱⁱ
 - International cultural visitors had a longer than average length of stay of 14.8 nights in Queensland, compared to 12.5 nights for all international visitors. ^{iv}
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1.9 Demographic Profile ⁱⁱⁱ

The following tables contain demographic information for **Australians who visited a cultural attraction or participated in a cultural activity** on their last holiday in Queensland. The information has been sourced from the National Visitor Survey (Bureau of Tourism Research).

Age	
15-24	11%
25-34	12%
35-44	22%
45-54	22%
55-64	15%
65+	18%

Sex	
Male	45%
Female	55%

Marital Status	
Single	23%
Part of a couple	77%

Lifestage	
Young single living at home	5%
Young single living alone/ in shared accommodation	3%
Midlife single	6%
Young/midlife couple, no kids	12%
Parent with youngest child aged 5 or less	10%
Parent with youngest child aged 6-14	16%
Parent with youngest child aged 15+ still living at home	7%
Older working single	2%
Older non-working single	4%
Older working married person	13%
Older non-working married person	23%

Working Status	
Working full time	44%
Working part time	16%
Unemployed and looking for work	2%
Retired or on a pension	24%
Mainly doing home duties	9%
Studying	5%
Other	1%

Household Income	
Less than \$25,999	19%
\$26,000 - \$36,399 pa	11%
\$36,400 - \$51,999 pa	18%
\$52,000 - \$77,999 pa	20%
\$78,000 - \$103,999 pa	14%
\$104,000 - \$129,000 pa	7%
\$130,000+	11%

1.10 Barriers

- It is generally recognised that there are particular problems in developing tourism products in more remote areas, which are often the areas with the strongest cultural resources. Therefore, one of the barriers to cultural tourism is the time and travel factor involved in location.^{vii}
- A barrier to the achievement of Australia's cultural tourism potential is the knowledge gap between the cultural and tourism industries. The cultural industry needs to work actively with the tourism industry to develop the skills needed to successfully target the cultural tourism market.
- Currently, tourism infrastructure is geared towards mass tourism, not cultural tourism. This makes it difficult for potential cultural tourists who are interested in unique experiences and visiting "off the beaten track" locations.^{viii}

1.11 Opportunities

- Cultural tourism is an increasingly important segment of the Queensland tourism industry.
- Research indicates that international visitors who seek cultural experiences in Australia are satisfied with their encounters. However, numerous opportunities exist for operators to generate more interest and satisfaction in some markets and stimulate interest in others.^v
- Cultural tourism provides mutual benefits for both the visitor and the tourism industry. Cultural tourism provides an opportunity for economic development through showcasing the region's cultural heritage and natural assets and helps contribute to the regeneration of cultural traditions, heritage and attractions.^{ix}
- Tourism operators are able to add value to their products by introducing activities that interpret our culture and provide authentic, meaningful experiences. Tourism operators can reach new markets and expand their businesses if they:^x
 - Emphasise quality before quantity
 - Ensure value for money
 - Ensure authenticity and integrity
 - Respect, preserve and, where appropriate, enhance the State's natural and built heritage; and
 - Provide memorable experiences with the emphasis on involvement and learning.

1.12 Marketing

- Cultural tourists are usually seeking a range of experiences. It could, therefore, be beneficial for tourism operators to partner together to sell their products.
 - Well-coordinated, cooperative marketing can involve such things as the marketing of a group of regional sites and museums, a standard set of brochures or themed publications.^{viii}
 - The promotion of unique "Australian experiences" is important as cultural tourists are motivated by a desire to see and learn about the qualities and experiences that make Australia distinct.^v
 - The development and maintenance of accurate, high quality cultural information is needed for visitors to be aware of cultural tourism opportunities in Australia.^v
 - To successfully compete with other cultural tourist destinations, an appealing, distinctive, clear and creditable image drawn from the lifestyle and environmental elements of our culture, which are unique, different or special, must be projected.^x
 - Nominating for one of the many cultural or heritage related awards will increase exposure to the cultural tourism product.^{xi}
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- ⁱ Selected Cultural Industries 1999 – 2000, National Centre for Culture and Recreation Statistics, Australian Bureau of Statistics, 2001
- ⁱⁱ Attendance at selected cultural venues, Australian Bureau of Statistics, April 1999
- ⁱⁱⁱ National Visitors Survey, Bureau of Tourism Research, 2002.
- ^{iv} International Visitors Survey, Bureau of Tourism Research, 2002.
- ^v Occasional Paper No. 27, Cultural Tourism in Australia: Characteristics & Motivations, Bureau of Tourism Research, 1998.
- ^{vi} ICOMOS Charter for Cultural Tourism, Draft April 1997.
- ^{vii} www.atsic.gov.au - March 2002
- ^{viii} Cultural Tourism Briefing Paper <http://simnotes.canberra.edu.au>, July 1998
- ^{ix} Creative Queensland, Queensland Government Cultural Policy, 2002.
- ^x International Council of Museums, Cultural Tourism: The Industry of the Next Century, <http://www.anbg.gov.au>, 2002.
- ^{xi} Museums Australia Queensland, <http://www.maq.org.au>, 2001

Further Information

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