National Heritage Tourism Summit Discussion Paper

NATIONAL TRUST

April 2018

Executive Summary

Globally, heritage tourism has become one of the largest and fastest-growing tourism sectors with the United Nations World Tourism Organisation estimating that more than 50%[1] of tourists worldwide are now motivated by a desire to experience a country's culture and heritage[2].

This Discussion Paper has been prepared by the National Trusts of Australia to inform and to drive a national discussion on the untapped potential of heritage tourism in Australia.

Key Findings

Social and Economic Benefits

Gains from heritage tourism are amplified throughout the global economy with social, community and heritage conservation benefits generally much larger than direct spending levels. Research indicates that visitors to heritage-based activities are more likely to seek high value experiences and deliver a higher spend than nature-based activities[3]. A dedicated research program is needed to support policy and product development and to better understand changing consumer needs and expectations.

Visitor Potential

Of all international visitors to Australia in 2017, 43% participated in a cultural activity and 33.9% in a heritage activity. Cultural and heritage segments are growing at 7.5% and 11.2% respectively over the past four years. These growth rates and the spend per visitor night demonstrate the enormous potential for further growth if attractive new products and experiences can be established to meet the needs of visitor markets. Heritage tourism activities contribute to longer stays, as well as attracting new visitor markets to regional Australia.

[1] Tourism Research Australia, IVS YE September 2017
[2] United Nations World Trade Organisation, *2016 Annual Report*
[3] Tourism & Transport Forum Australia, *Built Heritage and the Visitor Economy- The case for adaptive re-use of heritage assets* (2017)
[4] Tropical Tablelands Tourism, *Hero Experiences Guidebook* (2015)

Storytelling as a New Global Trend

Tourism across the globe is becoming more about journeys and experiences than simply viewing or visiting sites and destinations. Research has repeatedly found that what encourages a visitor to a certain destination is its ability to engage in unforgettable and truly inspiring experiences that touch visitors in an emotional way and connects them with special places, people and cultures[4]. Excelling in the art of storytelling and using innovative presentation skills to transport the visitor to a desired time and place is essential for heritage tourism attractions to compete on a global scale.

The Opportunity

Vision- National Trust

The National Trust movement is well recognised as custodians and presenters of Australia's unique heritage stories and visitor experiences.

Vision- Australia's Heritage Tourism Sector

World class heritage experiences showcasing and conserving Australia's unique historic, cultural and natural places and their stories.

Guiding Principles

Successful Heritage Tourism creating an environment where:

- Significance of places can be conserved and protected by investing in people and place;

- Heritage can drive and strengthen the tourism story;

- Mutually beneficial partnerships can be fostered and grown;

- Enjoyable and enriching visitor experiences can be delivered through story telling;

- Customers are embraced at all levels as our greatest ambassadors;

- Commercially robust products, services and sustainable business models are established.

Executive Summary

A Strategic Framework for Action

Strategic Directions

There is presently little guidance and direction at a national or state level on the scope, role, value and potential of heritage tourism in Australia. This paper advocates for a number of strategic initiatives to set in place a future agenda.

The following four strategic platforms are presented to drive the next stage in the development of heritage tourism in Australia. All the initiatives require collaboration and need to be implemented by the tourism and heritage sectors working in partnership with community, industry and government stakeholders.

The National Trust can take a leading role in advocating and implementing these initiatives through its network of more than 300 heritage properties across Australia.

1. Create a strong voice through National Alliances and Partnerships

Strategic co-ordination and leadership is needed to drive a heritage tourism agenda. To build national support for this agenda, a Heritage Tourism Working Group needs to be established. The working group would be an association of national organisations who support heritage tourism and seek to lift its profile. The creation of an annual Heritage Tourism Conference is needed to draw together important players in the industry to discuss trends, opportunities and policies to give the sector a shared direction.

2. Demonstrate the Social and Economic significance of Heritage Tourism

A dedicated tourism research program is needed to inform business planning, provide strategic insights for product development and marketing and demonstrate social and economic return.

The Heritage Tourism Working Group needs to work closely with Tourism Research Australia, the Tourism Industry and the Tertiary Sector to track the economic and social contribution of heritage tourism and to benchmark and monitor the changing needs and expectations of visitor markets.

3. Be the Leader in Storytelling

Storytelling is the new focus of tourism and the heritage sector needs to develop its capabilities in capturing, and sharing stories in ways which resonate with new visitor markets and create unique, memorable experiences.

The creation of a storytelling toolkit and visitor experience development plans for heritage places will help support this new trend and build capacity within the industry. It will be the role of the heritage sector to work in partnership with the community and tourism industry to review and provide direction on how heritage stories and experiences can be incorporated into destination management plans and tourism strategies.

4. Develop a National Heritage Tourism Strategy

A National Heritage Tourism Strategy is needed to guide product and experience development and destination marketing across Australia. The plan is needed to help align existing National State/Territory and regional destination management plans together with Indigenous, ecotourism and cultural tourism strategies that have already been prepared.

Next steps

This Discussion Paper will be reviewed at a national summit which will be held at Burra, South Australia in April. Following the Burra Summit, a series of pilot projects will be completed across Australia using the National Trust's Heritage Tourism Experience Framework.

Once the pilot programs are completed and evaluated a White Paper will be prepared by the National Trust. The White Paper will be presented to key stakeholders including the Commonwealth Government for endorsement and support.

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Kanyaka Station Ruins, courtesy South Australian Tourism Commission

EARTHCHECK

9 April 2018

1 Setting the Scene

Redruth Gaol, courtesy of Regional Council of Goyder

This Discussion Paper has been prepared by the National Trusts of Australia to drive a national discussion on the untapped potential of heritage tourism in Australia.

The paper draws on national and international research and market trends to elicit and inform a discussion on opportunities and challenges in growing Australia's heritage tourism industry. The Discussion Paper is a precursor to the development of a white paper and a National Heritage Tourism Strategy.

1.1 Why Tourism and Heritage?

The tourism industry and the visitor economy it supports potentially offers a powerful partner for the heritage sector.

Globally, tourism has become one of the largest and fastest-growing economic sectors, with investment in tourism acting as a key driver for job and enterprise creation. It is responsible for 10.2% of the world's Gross Domestic Product (GDP) generating one in ten jobs in the global economy[5]. Through continued expansion of tourism destinations, products and services, international visitor arrivals worldwide have rapidly grown from 25 million to 1.13 billion over the past six decades[6].

This trend is expected to continue as the United Nations World Tourism Organisation (UNWTO) has estimated an expected annual increase of 3.3% in international arrivals until the year 2030[7], a prediction which has been supported by six successive years of global travel and tourism GDP outpacing the global economy. The Asia-Pacific region is expected to outperform predicted growth, receiving over half a billion visitor arrivals by 2030 and increasing its overall market share by 4.9%[8].

In Australia tourism has experienced consistent growth in both domestic and international markets in recent years. Over the next two years international visitor numbers to Australia are expected to increase 13.1% from 8.6 million in 2016/17 to 9.7 million in 2018/19. Total tourism spend which includes spend by international visitors is also forecast to increase 4.7% to $126 Billion in 2017/18.

Australia is regarded as a highly aspirational destination for international markets[9]. The richness of its heritage experiences, particularly Indigenous culture, represents a key part of Australia's appeal.

> With a growing international market and a rich history with many places being of historical significance, Australia has the opportunity to develop a successful heritage tourism sector.

"Tourism is too important a resource to be left to the tourism professionals. It needs to be part of a community mobilisation strategy that can reinvent the role of heritage so that it serves the needs of everyone." - *Bob McNulty, Partners for Liveable Communities.*

The National Trust in Australia is one of the most significant owners and operators of heritage places and experiences and is well placed to lead a national discussion on the future of heritage tourism in Australia.

? What is needed if the heritage industry is to develop a successful partnership with the tourism industry and meet the needs and expectations of modern visitor markets?

What actions are needed and who does the heritage industry need to partner with to develop a sustainable heritage tourism sector in Australia?

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[5]World Travel and Tourism Council, 2017, Travel and Tourism: Economic Impact 2017 World
[6]UNWTO, Tourism Highlights 2015 edition
[7]United Nations World Tourism Organisation, *Tourism Towards 2030/Global Overview*, 2011
[8]United Nations World Organisation, *UNWTO Tourism Highlights 2017 Edition* (14)
[9]South Australian Tourism Commission, April 2017, International Market Profile: India

1.2 Understanding Heritage Tourism

What is Australia's heritage?

Australia has a rich natural and cultural heritage that underpins our sense of place and national identity. Our heritage includes stories, traditions, events and experiences inherited from the past and is comprised of natural, historic and Indigenous places with both tangible and intangible values[10].

The Commonwealth Government's Australian Heritage Strategy notes that recognition of Australia's heritage acknowledges our complex natural and cultural history and reflects the diverse values and experiences of Australians.

> Interpretation, celebration and commemoration of our heritage places provides opportunities for communities and visitors to recognise, understand and to be part of Australia's stories.

The Burra Charter for places of cultural significance, which provides the industry standard for the care of heritage sites, recognises that places of cultural significance enrich people's lives, often providing a deep and inspirational sense of connection to community and landscape, to the past and to lived experiences.

? What is Heritage Tourism and how should it be defined?
(What can we learn from global experience?)

What is Heritage Tourism

Globally tourism is becoming more about journeys and experiences than simply viewing or visiting sites and destinations. The European Commission has designated 2018 as a Year of Cultural Heritage. It aims to encourage people to explore the rich and diverse cultural heritage across Europe by celebrating, understanding and protecting its unique values.

The National Trust for Historic Preservation in the United States defines heritage tourism as "travelling to experience the places, artefacts and activities that authentically represent the stories and people of the past and present including cultural, historic and natural resources.[11]

> Global travel trends indicate that travellers are seeking more authentic destinations where they can connect with the local community, immerse themselves in local culture and develop a rich knowledge and understanding of place.

Tourism Australia has more recently partnered with industry to develop Signature Experiences Australia- a program which packages and promotes Australia's outstanding tourism experiences within a variety of special interest categories.

Given the above discussion it can be expected that travellers who are interested in heritage tourism would visit or participate in the following types of activities (over page):

? Do the definitions of heritage tourism provided adequately describe the scope of heritage tourism activities and experiences?

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[10] Australian Government, *The Australian Heritage Strategy* (2015)

[11] National Trust for Historic Preservation, *Heritage Tourism* (2015)

1.2 Understanding Heritage Tourism

- Historical events, festivals, concerts and arts/musical performances

- An interest in places which have aesthetic, historic, scientific, social or spiritual value for past present and future generations

- Historically significant buildings, neighbourhoods, parks or communities

- Museums, churches, art galleries, theatres and art spaces which have a community story to tell

- Themed touring routes and trails which can be driven, cycled or walked

- Natural and modified landscapes which reflect Indigenous, industrial and farming values

- Ancestry related stories and records

- National customs including food and wine, arts, crafts and language

While there is ongoing discussion on the strict definition of Heritage Tourism, for the purpose of this Discussion Paper, the following is put forward as a working definition:

> "'Travel to experience stories, places and traditions embodied in natural, built and cultural heritage."

Consistent with the vision of the Australian Heritage Strategy and the preamble provided in The Burra Charter, this Heritage Tourism Discussion Paper recognises that heritage tourism, by nature, is diverse and includes natural, historic and Indigenous themes and values. Figure 1 (right) shows the current legal and policy frameworks that govern heritage tourism activities.

HERITAGE TOURISM

Natural Places and Values	Indigenous Places and Values	Historic Places and Values
Scenic landscapes, deserts, coasts, forests	Indigenous sites	Towns and historical landscapes
Flora and fauna	Indigenous culture	Historic buildings
Geological features	Aboriginal art	Mines
	Indigenous guided tours	Museums
Guiding Documents	**Guiding Documents**	**Guiding Documents**
Environmental Protection and Biodiversity Conservation Act	Aboriginal and Torres Strait Islander Heritage Protection Act	Australian Heritage Strategy
State Ecotourism and nature-based strategies	State Indigenous Tourism Strategies	National Trusts of Australia Strategic Plan
		State Cultural and Heritage Tourism Strategies

Figure 1: Scope of heritage tourism

Heritage lists articulate the reasons why heritage places are significant and worth protecting. This recognition can in turn provide motivations for visitors to travel to experience and build an understanding of what makes such places special.

The Australian Government is responsible for providing heritage leadership nationally. It has responsibility for the identification, protection and in some cases management of those heritage assets inscribed in the World Heritage List, those inscribed in the National Heritage List and on the Commonwealth List. The Australian Heritage Council is the key advisor to the Minister for the Environment on heritage matters.

State, Territory and Local Governments, as well as private property owners have responsibility for the day to day management of many places on the World and National Heritage Lists as well on those on State and Local Government Lists.

Many important milestones have been achieved in the protection of Australia's heritage, beginning with the formation of the Australian National Trust movement in 1945.

Heritage has increasingly become an important element of the tourism product while at the same time, tourism provides an important means of enhancing heritage and creating income to support and conserve places of cultural significance. A strong relationship between tourism and heritage places can support regional economic development and play a part in helping to build and protect sense of place.

The recent growth in heritage tourism can be explained in terms of both demand and supply side factors. On the demand side tourists are increasingly consuming more layers of culture and heritage as their desire to interpret and understand it grows. On the supply side, more heritage sites are looking for ways to assist with the preservation and presentation of their stories.

The Australian National Trust movement comprises eight community-based, non-government, not-for-profit organisations in each of the states and territories. These organisations are committed to promoting, conserving and interpreting Australia's Indigenous, natural and historic heritage through advocacy, education, care and custodianship of heritage places.

Currently, Australia's National Trusts own or manage more than 300 heritage places (the majority held in perpetuity), manage a volunteer workforce of more than 4,000 while also employing about 350 people nationwide. The Trusts are supported by an Australia-wide membership base of 60 000 people.

?

What do we understand about the social and economic benefits of heritage conservation to Australian society?

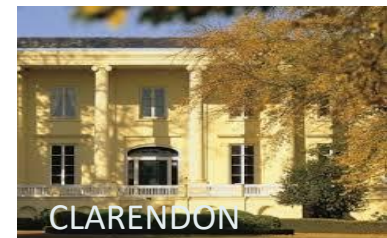What key social and economic performance measures should be used to monitor and measure our success?

Convict Heritage sites Brickendon, Woolmers and Claredon were pilot properties of the National Trust Experience Development Framework. Courtesy of National Trust of Tasmania

1.4 Building on Common Ground for Heritage Tourism

While the tourism industry, heritage managers and host communities have a diverse range of needs and expectations, there is a foundation of common interest which provides great potential for mutual benefit.[12]

Common interests act as a starting point for the sustainable management of heritage. Key drivers include promoting thoughtful visitor engagement at all points of the visitor relationship cycle, increasing anticipation, promoting interest and raising the post-visit enthusiasm of participants towards broader community and conservation benefits. Well informed and positively activated visitors are more willing to engage with conservation activities and to act as ambassadors of places to the wider community.

Strong relationships between tourism and heritage places are integral to regional development, place building and promoting the conservation of heritage values. Stronger tourism products provide much needed economic and social benefits to small communities. Heritage tourism provides additional income and employment for local economies and can foster longer term social benefits such as a strengthening local identity and sense of place, as illustrated In Figure 2.

?

What are the shared interests of tourism operators, heritage managers and communities?

How can heritage tourism and heritage conservation support each other?

SUCCESSFUL HERITAGE TOURISM

Builds on common ground

Presents and protects the heritage places

Tourism Businesses

Products, customers, profits

Community

Community development, ownership, identity

Heritage Managers

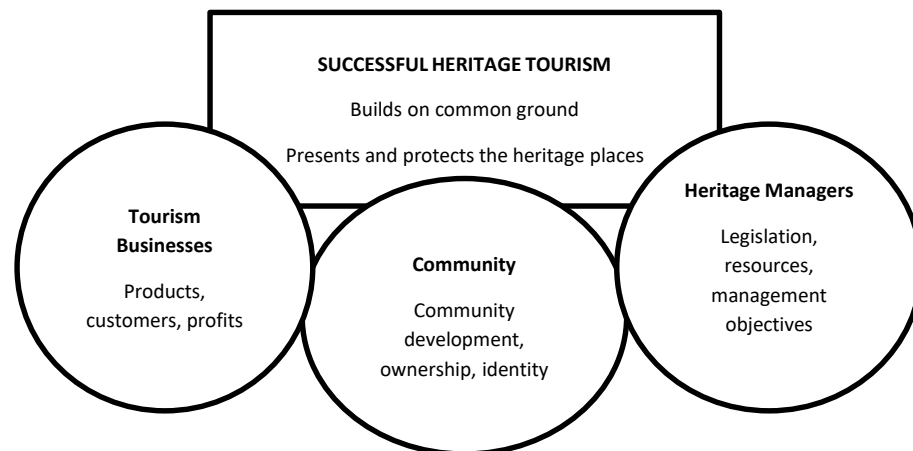Legislation, resources, management objectives

Figure 2: The potential benefits of heritage tourism (sourced from Successful Tourism at Heritage Places, 2001).

[12]Successful Tourism at Heritage Places, *A Guide for Tourism Operators, Heritage Managers and Communities*, 2001

Authentic storytelling forms a key part of tourism today, and the successful delivery of unique local experiences with genuine connection at every stage of the visitor relationship cycle has benefits beyond tourism and economic growth. The "**Heritage Cycle**" (Figure 3) outlines the benefits which successful heritage tourism provides to heritage places, promoting an increase in care, interest and understanding of heritage which leads to stronger support for conservation activities[13].

Successful heritage tourism promotes long term benefits for the conservation and sustainability of heritage resources.

The benefits of successfully articulated heritage tourism can be summarised as:

- **Enriches the quality and authenticity of the visitor experience;**

- **Aims not simply to describe, but to provide meaning and understanding to local tourists;**

- **Contributes to conservation outcomes, and;**

- **Builds on and captures a sense of place.**

By Understanding

They will value it

From Enjoying

Comes a thirst to understand

By Valuing

They will want to care for it

It will help people enjoy it

By Caring
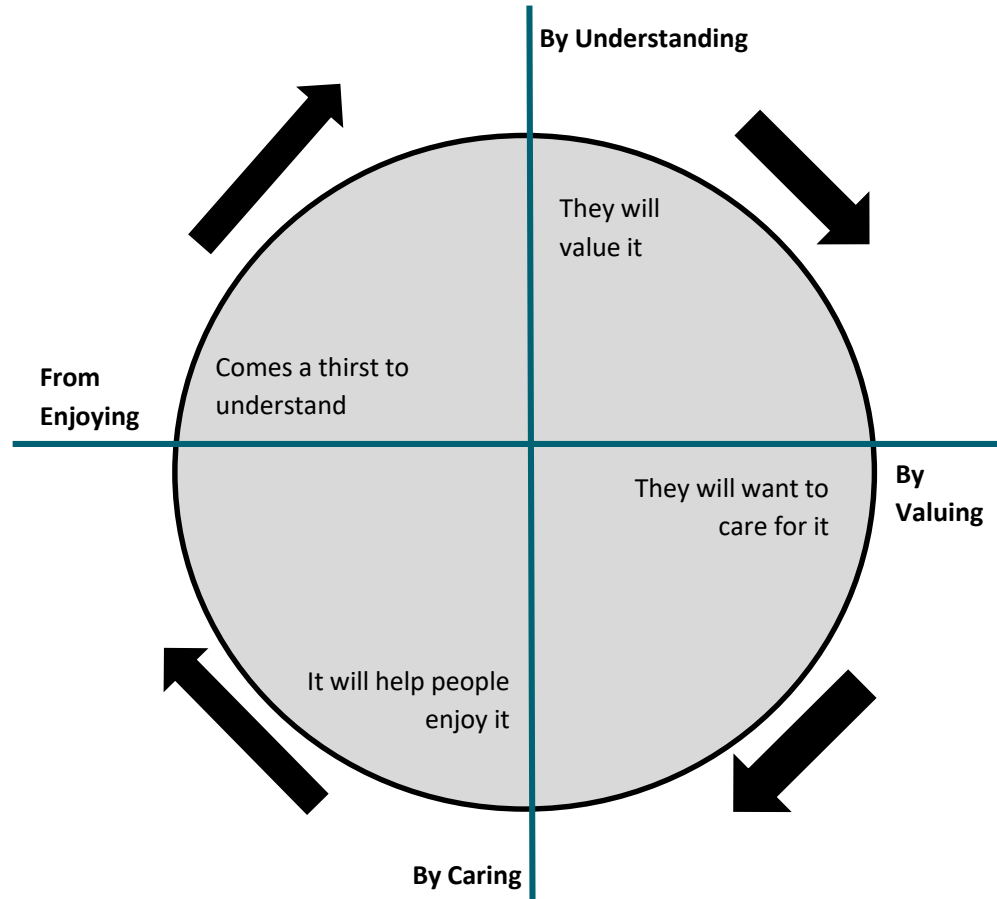
Figure 3: The Heritage Cycle by Simon Thurley

[13]Simon Thurley, 2005, Into the Future. Our Strategy for 2005-2010. *Conservation Bulletin* (English Heritage)

2 Visitor Research and Trends

Kati Thanda-Lake Eyre National Park – Arabunna Cultural Tours, courtesy of South Australian Tourism Commission and Adam Bruzzone

Heritage tourists are predominantly domestic day and domestic overnight visitors. These markets provide volume and stability to the market and exhibit potential for growth through tailored offerings.

There is a proportionally greater participation rate in cultural and heritage activities by international visitors, despite the comparatively small size of the total international markets. Additionally, the international market is expected to have significantly greater potential for growth in coming years.

2.1 Cultural, Heritage and Nature-based Activities

All data has been sourced from Tourism Research Australia (TRA) from data sets collated through the National Visitor Survey (NVS) and International Visitor Survey (IVS).

Any analysis of heritage tourism relies on the categorisation of related activities into "activity segments", which have been defined by the Australian Bureau of Statistics (ABS). There are three which directly relate to heritage tourism.

Table 1: Activity Segments as defined by the Australian Bureau of Statistics

Categories	Variables
Nature	• Go whale or dolphin watching • Visit a national parks/ state parks • Visiting botanical or other public gardens • Bushwalking /rainforest walking
Culture	• Attend theatre, concerts or other performing arts • Visit museums or art galleries • Visit art/ craft workshops/ studios • Attend festivals/ fairs or cultural events • Experience Aboriginal art/ craft and cultural displays • Visit an Aboriginal site/ community
Heritage	• Visiting history/ heritage buildings, sites or monuments

These are defined categories designed to provide information on specific activity segments, and do not include the most popular and unrelated activities such as Dining Out, Visiting Friends and Relatives, Shopping for Pleasure, Sightseeing and Going to the Beach.

As demonstrated by Figure 4, of the three activity segments, nature-based currently has the most participation when considering all visitor markets. It is important to note that given the activities included within the nature-based category, there is an overlap between the intrinsic heritage values of natural places and cultural activities.
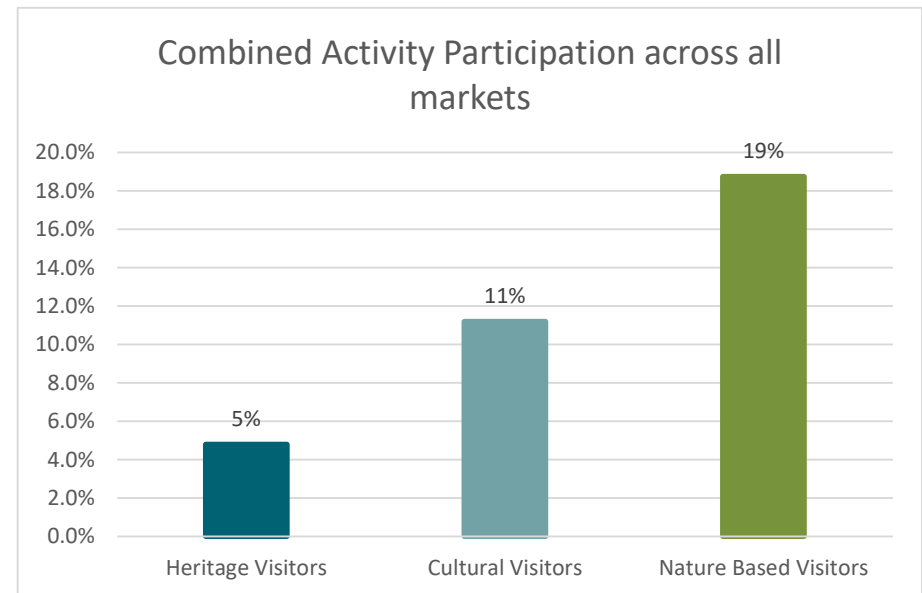

Figure 4: Visitor activity segment participation by combined international and domestic visitors.

The nature-based segment is experiencing per annum growth of 9%, while individual cultural and heritage segments are growing at 7.5% and 11.2% respectively (see Figure 5). This indicates that the cultural and heritage activity segments are experiencing a combined industry growth of 8.5%, above the national average and almost on parity with the more mature industry of ecotourism.
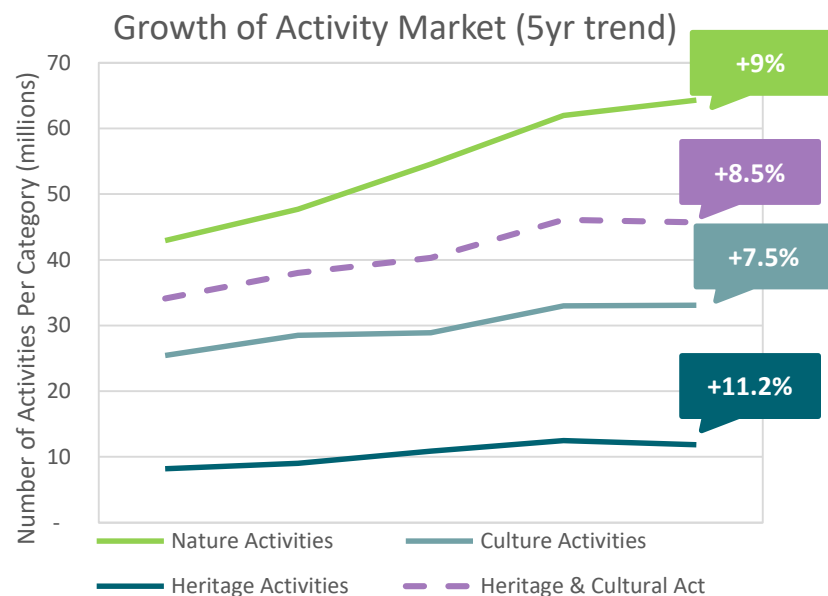
Growth of Activity Market (5yr trend)

+9%
+8.5%
+7.5%
+11.2%

Legend: Nature Activities, Culture Activities, Heritage Activities, Heritage & Cultural Act

Figure 5: Growth rates in Tourism Australia's Activity Segments

When viewed through the lens of the Tourism Australia Activity Segments (Table 2, right) cultural and heritage activity segments are experiencing clear growth across both domestic and international markets. Please note that average growth rates in Figure 5 are different to Table 2 due to the difference in time frames used for analysis.

Table 2: Visitor numbers and trends by Tourism Australia Activity Segments

		2014	2015	2016	2017	Trend
Australia Wide	Aquatic and Coastal	50,687,301	53,100,053	56,211,399	58,138,350	4.9%
	Food and Wine	37,396,290	41,667,564	42,655,897	41,282,908	3.6%
	City Based	204,837,460	214,728,535	226,330,355	236,679,854	5.2%
	Sports and Adventure	30,053,528	32,057,761	35,512,716	37,945,217	8.8%
	History and Culture	30,997,557	32,176,382	36,093,538	35,619,734	5.0%
	Natural Beauty	38,582,747	42,946,126	48,405,106	49,840,514	9.7%
	Wildlife	6,400,020	5,832,600	7,000,068	6,811,515	2.1%

		2014	2015	2016	2017	Trend
Cultural Heritage	Domestic Day	14,248,614	14,311,320	16,973,111	15,920,729	3.9%
	Domestic Overnight	13,466,887	14,200,975	14,873,265	15,205,711	4.3%
	International	3,282,056	3,664,088	4,247,162	4,493,294	12.3%

Sourced from Tourism Research Australia NVS and IVS surveys (YE September 2017)

? What type of visitor research is needed if we are to track and measure the success of heritage tourism? What indicators should be used as performance measures?

2.2 Opportunities for Growth

Cultural and heritage activities are quickly approaching the size and profile of nature-based tourism. Cultural and heritage activities provide opportunities to increase visitor dispersal and length of stay in international markets, leading to an increase in value of this high-value group. The growth of cultural and heritage activity segments indicates an increasing recognition of Australian cultural and heritage offerings from both the international and domestic markets.

Figure 6, below outlines both the historic combined (both domestic and international) cultural and heritage visitors and the projected growth to 2030 as provided by Tourism Forecasting Referencing Panel. This growth rate demonstrates the potential impact that successful collaboration, new product development and marketing investment could achieve by 2030; providing an additional 25 million visitors annually who engage with cultural and heritage activities (a 6% growth in each market segment).

Fast Facts: The Cultural Heritage Market

The heritage and cultural markets contribute 34.6 million national visitors per year

261.2 million national visitor nights p.a.

Average length of stay of 13.3 nights

$32.2 billion in total visitor spend p.a.

43.4% are domestic day visitors

44.1% are domestic overnight visitors

Cultural and heritage visitors aged 25-29 years have increased the most since 2013

Roughly half of all international visitors undertake more than one cultural and heritage activity on average

Can heritage activity segments provide opportunities to increase visitor spend and length of stay?

Combined Cultural and Heritage Visitors — Shift Share

Figure 6: Potential additional cultural and heritage visitors above baseline growth

2.3 The Heritage Visitor: A Profile

The heritage visitor is an evolving demographic, but is broadly characterised by a high level of income and mobility, with high levels of education[15] with an interest in learning and exploring new concepts.[16] The heritage visitor spends more and stays almost twice as long than other international visitors.[17] Demographic shifts are underway in the heritage visitor profile, with the fastest growing segment engaging in heritage activities are the younger ages, between 20-34, highlighting the need for the industry to revolutionise its approach to visitor engagement to retain the growth in these highly connected, well informed and digitally social age groups.
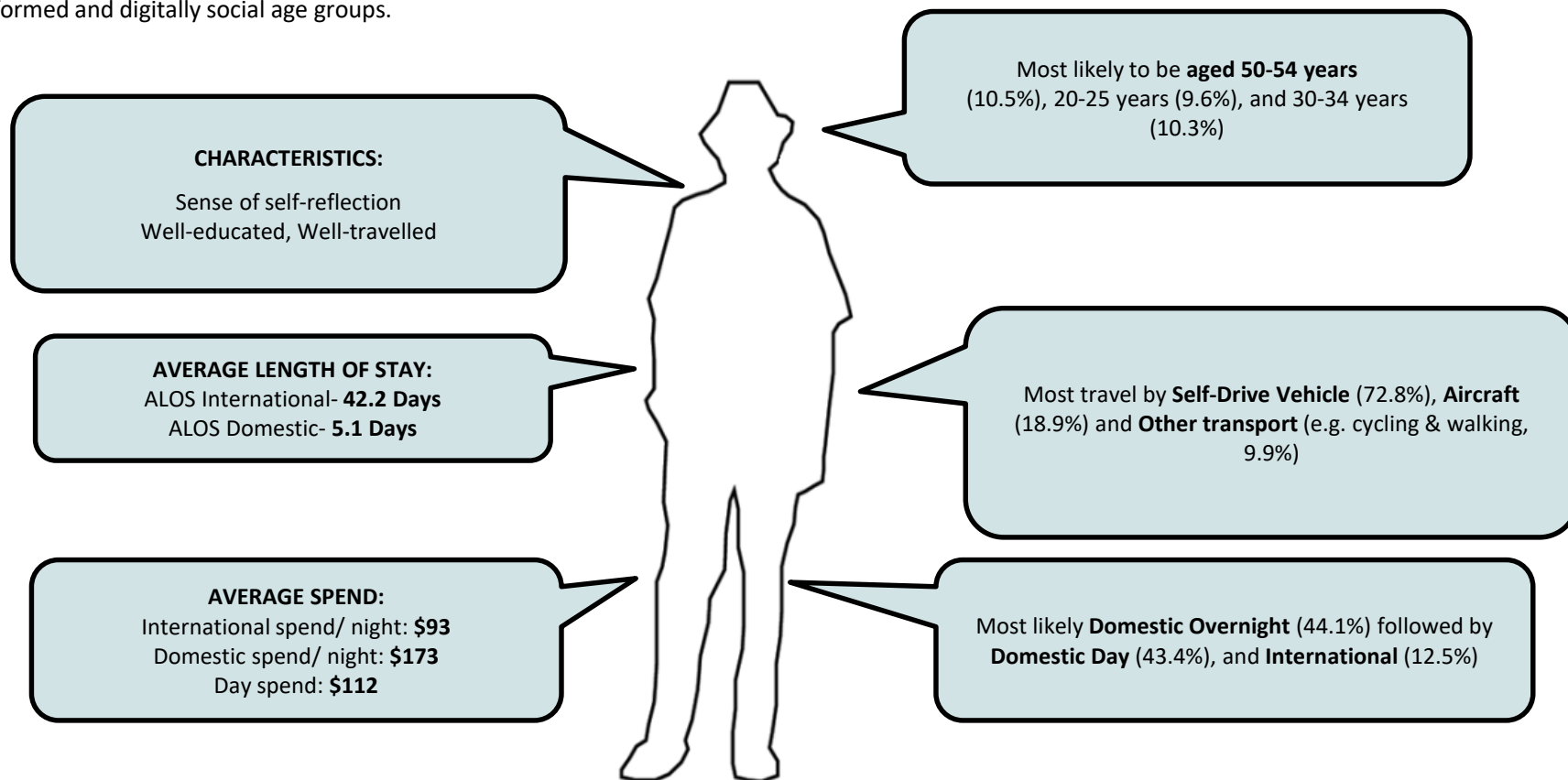
CHARACTERISTICS:
Sense of self-reflection
Well-educated, Well-travelled

Most likely to be **aged 50-54 years** (10.5%), 20-25 years (9.6%), and 30-34 years (10.3%)

AVERAGE LENGTH OF STAY:
ALOS International- **42.2 Days**
ALOS Domestic- **5.1 Days**

Most travel by **Self-Drive Vehicle** (72.8%), **Aircraft** (18.9%) and **Other transport** (e.g. cycling & walking, 9.9%)

AVERAGE SPEND:
International spend/ night: **$93**
Domestic spend/ night: **$173**
Day spend: **$112**

Most likely **Domestic Overnight** (44.1%) followed by **Domestic Day** (43.4%), and **International** (12.5%)

Figure 7: Characteristics of the typical heritage visitor (TRA NVS and IVS YE September 2017)

[15]Katstenholz, E., Carneriro, M.J., Eusebio, C., 2005, *The impact of socio-demographic on tourist behaviour – analysing segments of cultural tourists visiting Coimbra,* University of Aveiro, Department of Economy, Management and Industrial Engineering
[16]Alzua, A., O'Leary, J.T., Morrison, A.M., 1998, Cultural and Heritage Tourism: Identifying Niches for Heritage Travellers, *The Journal of Tourism Studies,* 9:2, Dec 1998
[17]Tourism Research Australia IVS YE Sept 2017

2.4 Heritage Visitors: Primary Target Markets

Typical heritage visitors are recognised to share a set of common set of behavioural and motivational traits, which influence their expectations, interests and needs in heritage experiences. The following psychographic visitor segments have been identified as those with the greatest propensity to engage in heritage activities and experiences. The segments have been adopted locally and internationally by a number of national tourism organisations including Tourism Research Australia and Fáilte Ireland, providing a framework which assists destinations and businesses align experiences with target markets.

'Experience Seekers' who want[19]:

- *Authentic* experiences and destinations
- To *meet the locals*
- An experience of *something different*
- *Learning* about and participating in different lifestyles and cultures
- *A challenge* – physically, emotionally and/or mentally
- *Unique* and compelling experiences

'Culturally Curious' travellers who are seeking[20]:

- *To be immersed* in local culture
- *Explore and discover* more about themselves
- Delve into the *local history*
- Consume *local specialities*
- Feel a connection to a *living culture* through history and stories
- Real and *genuine experiences*

These markets have common requirements which influence their destination selection and are integral to successful industry operation, including:

- **Friendly service,** hospitable people, and knowledgeable guides
- A **secure and safe** destination with plenty of available information pre-arrival
- **Beautiful scenery** with a range of **natural attractions**
- Plenty of **things to see, do and experience** in close proximity
- Interesting **history and culture** and mostly looking for stories
- **Relaxed** and easy pace
- **Value** for money

Source: Fáilte Ireland, *Global Segmentation Toolkit*, 2016

[19]Tourism Australia, 2012, *Australia's National Landscapes Program: Experience Development Strategies*
[20]Fáilte Ireland, *Global Segmentation Toolkit*
Picture 1: Claredon, Tasmania: Penny farthing races, Picture 2: Queensland Art Gallery/GOMA

Understanding visitors' motivations for seeking out heritage is an essential part of developing authentic visitor experiences.

Visitors are becoming increasingly engaged, seeking out destinations with enriching cultural heritage experiences. There is a transition from traditional holidaymaking and sightseeing, with visitors wanting to be captivated and immersed in cultural sites. This has been reflected in the awareness and deliberateness of destination selection, with TripAdvisor "TripBarometer – Traveler Trends and Motivations" (Figure 8) demonstrating that almost a third of visitors consciously make a choice based on potential cultural experiences[22].

Tourism is becoming more about journeys of discovery and self-realisation through interactive engagement with creative narratives. This hands-on approach is prompting a shift away from static sites and monuments and is seeing higher demand for the following elements of heritage tourism:

- Increased contact with local culture;

- Increased emphasis on the everyday and intangible heritage;

- A shift towards events as a means of build a connection to place;

- Holistic spiritual approaches; and

- Expectations of authenticity.

Culture, cost and climate are key draws when choosing a destination

31% of travelers select a destination for its culture

Almost half (**47%**) of travelers choose a destination because of price

One in five travelers state that weather was an important factor in choosing their destination

Top ten reasons for choosing a destination

Reason	%
Experience the culture/society/people	31%
Accommodation had a good price	22%
For the weather	20%
Recommended by a friend/relative	16%
Flight had a good price	16%
Family-friendly	15%
Cheap holiday/vacation option	14%
Great for my age group	12%
Family ties	11%
A good price for a luxury destination	10%

Figure 8: Visitor methods of booking trips (as compiled by TripAdvisor)

James Cook Museum, courtesy National Trusts of Queensland

[22]TripAdvisor, *TripBarometer- Traveler Trends & Motivations Global Findings*, 2016

2.6 Understanding the Distribution System and why it is important for Heritage Tourism

Visitor expectations are evolving in tandem with new online decision-making tools. The influence of technology and digital trends on visitor communication and persuasion are revolutionising the way products and services are offered to market. The traditional top-down dissemination of information has been swiftly replaced by a decentralised approach to place branding, where consumers self-select, generate and disseminate information on behalf of places and organisations.[23] This shift provides new risks and opportunities to the tourism sector as information flows more rapidly and reaches farther than previously. Figure 9 outlines the "visitor ecosystem" and the digital presences which influence visitor decisions at each step of the cycle. This reveals a visitor preference for "on-demand and convenient" services which draw on every industry sector[24].
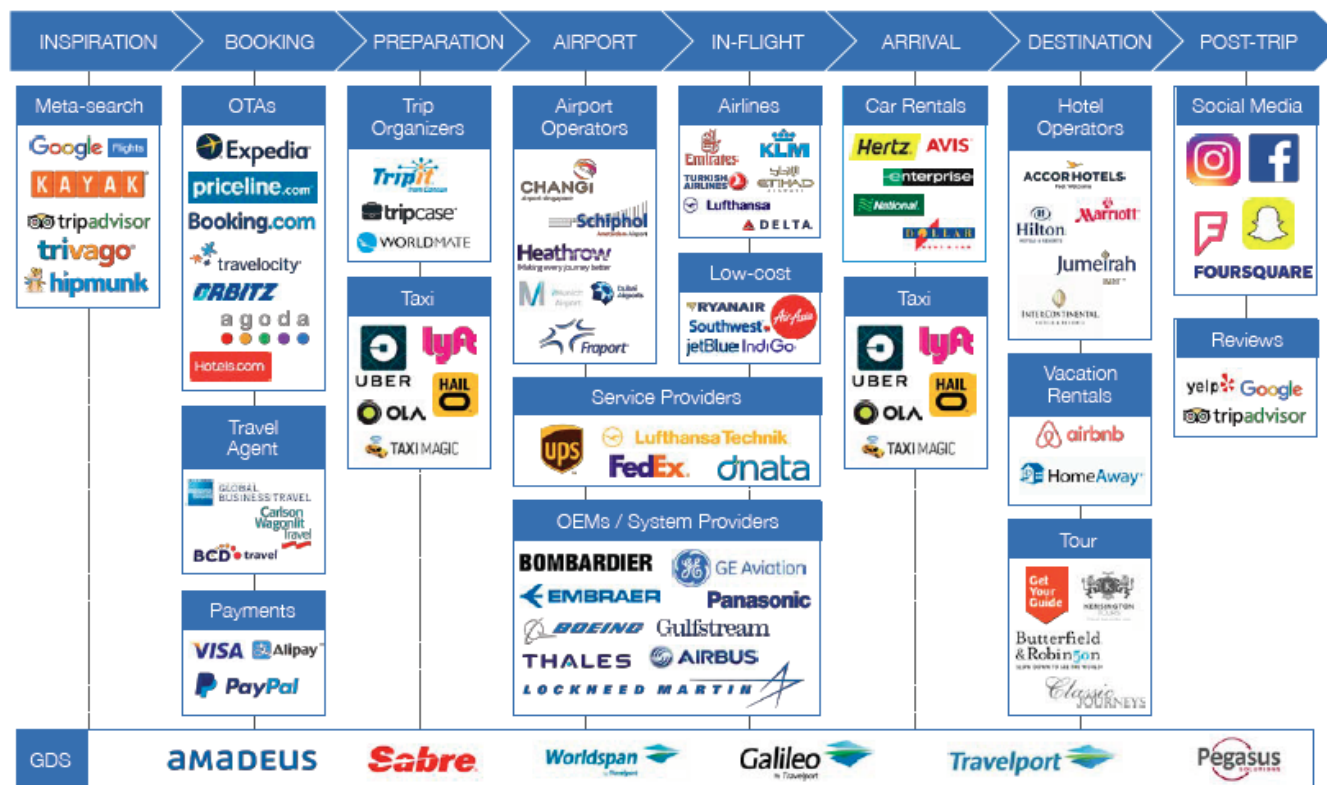
Source: World Economic Forum/Accenture analysis

Figure 9: The "visitor ecosystem" as presented by the World Economic Forum

[23]Go, M., Trunfio., 2012, A Paradigm Shift from Tourism Destination Management to Democratic Governance of Place Branding, *Journal of Travel and Tourism Research (Special Issue Destination Management)*
[24]World Economic Forum, *Digital Transformation Initiative- Aviation, Travel and Tourism Industry*, 2017

The demand for seamless digital experiences is driving the need for digital transformation across the heritage tourism sector to raise its profile and increase engagement throughout the visitor relationship cycle, which is represented in Figure 10:
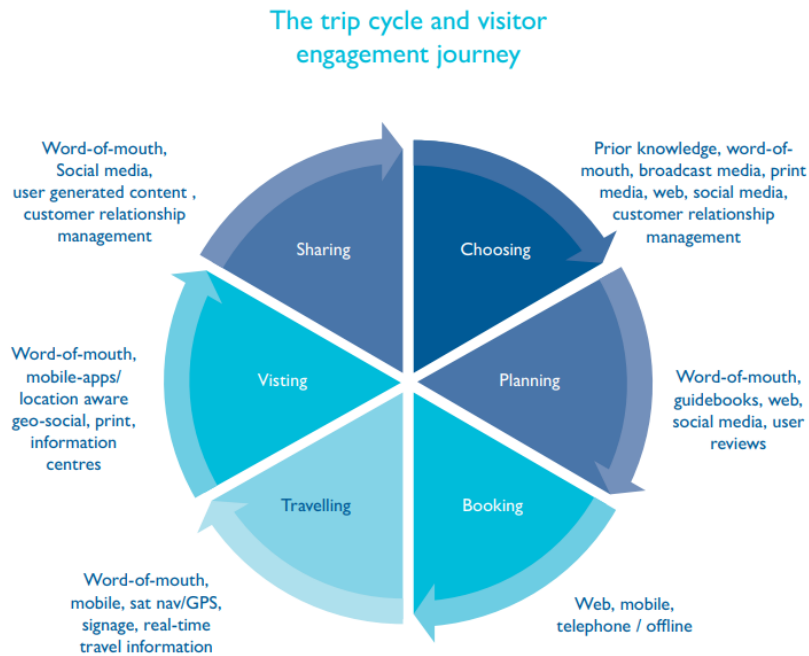

Figure 10: The visitor relationship cycle[25]

[25] State of Tasmania, 2016, Tasmanian Visitor Engagement Strategy

This new relationship cycle requires two key things from the heritage tourism sector:

- **Active visitor engagement not only when visitors are in-destination, but both prior and post visit to ensure ongoing positive interactions and brand building with past, current and future visitors; and**

- **Engaging experiences which promote visitors to act as ambassadors through these channels; either by liking, commenting or sharing organisation posts, but by actively sharing their own experiences through pictures and posts.**

Increasing digital presence and engagement across the visitor relationship cycle can be driven by visitors' interest in sharing their experiences, supplementing organisational activities by providing passive user-generated marketing and promotion and placing heritage experiences into the "inspiration" category of the visitor ecosystem illustrated in Figure 9 (previous page).

Increasing presence and engagement and encouraging passive advertising through previous visitors can move heritage into the "inspiration" and "choosing" phases of each of the visitor cycles.

? Where does heritage tourism fit in the experience economy?

3 Challenges and Opportunities

Copper Coast Cornish Festival, courtesy of Kernewel Lowender

While heritage tourism is growing, it does not yet have a strong national profile. The Tourism Australia 'Signature Experiences of Australia' program currently focus on select industry experiences that have a compelling marketing proposition and share a common goal and vision.

Discussions with the heritage sector have identified the following challenges in realising the potential of heritage tourism in Australia:

- **There is pressure from declining funds** for heritage tourism site conservation and development;

- A general **lack of integration and coordination** of heritage elements in national, state or regional tourism marketing – with some exceptions (e.g. Tasmania and Victoria through events).

Through the engagement of key stakeholders and a review of the wide range of state and national documents relating to heritage tourism, the following additional challenges can be identified:

- **A wider definition and approach** – many heritage sites have a desire to widen the definition of 'heritage tourism' as it applies to heritage places to include natural and Indigenous stories. In some cases this requires new presentation skill sets and a re-evaluation of interpretation. There is also some uncertainty about how to include Indigenous stories.

- **The values of heritage tourism are not well known**– unlike other sectors, especially nature-based and eco-tourism, there is limited awareness of the overall value of heritage tourism activities and the total contribution of heritage tourism to the wider economy. This can be remedied, but requires an agreement on research methods and data collection, collation and analysis.

- **Trends in heritage tourism are not widely understood** – while some Tourism Research Australia publications provide information on the trends in heritage tourism nationally, this is not widely distributed to those on the ground and not well understood. A better understanding of these trends would provide a firm foundation for stronger partnerships between regional and local tourism bodies and the heritage tourism partners.

- **Traditional market focus** – while the market trends in heritage tourism show growth in younger participants, the majority of attractions on the ground are focussed on delivering experiences to meet the needs of the Baby Boomers and traditional older travellers. The learning and interpretation needs of younger markets are not well understood and as a result, the delivery is not meeting the needs of these markets in many cases.

- **A distrust of tourism exists** – across many of the local and some of the State heritage asset managers there exists a distrust of the tourism sector based on poor experiences previously. This extends from 'lip service' from tourism partners to work with heritage tourism products, to a concern that tourism remains an exploitative sector that is not committed to sustainable development of heritage experiences.

- **A distrust of heritage managers exists-** many tourism operators feel that heritage managers don't understand the needs of the visitor market or the need to work with local and regional tourism organisations. Without formal marketing, pricing and product development programs it is often difficult to include heritage sites in tourism packages.

- **The traditional mindset is to stand alone** – traditionally, heritage product has stood alone in a conservation space, underpinned by an expectation that society – both the public and potential partners – would wish to conserve the product based purely on its heritage value. An understanding of the needs of the new visitor economy and the role played by the tourism industry needs to be fostered.

- **Storytelling comes naturally** – while the growing trend in customer engagement towards storytelling is perfectly suited to many heritage sites and their managers a wide number of sites need both training and support in experience development and story- telling.

> Despite the challenges facing the establishment of heritage tourism as a core component of Australia's tourism infrastructure, there is extensive evidence of its huge potential contribution to the nation's tourism agenda.

What are the current challenges to the successful development of heritage tourism in Australia?

3.2 The availability of government support

The management of heritage places is ultimately determined by available resources of which a large portion is contributed by government because heritage is considered a public good. However, there is always the issue of who pays for heritage conservation and management (the owners, community or government). Heritage is available to all, but often funded by few. Many heritage places are privately owned and their benefits shared by owners and the community, so it is reasonable that the owners contribute a portion and the government assist with other support.

There are also some legal impediments for Commonwealth funding to be directed towards heritage places not on either the World Heritage nor National Heritage Lists. This is further complicated by the availability of Commonwealth monies for the vast majority of heritage places such as those held by the National Trusts of Australia.

Public funding through grants for heritage in Australia is very low in comparison with international figures[26]. This is considered due to a lack of policy emphasis on the value of heritage places[27] which has resulted in reduced funding and management activities, placing pressure on owners including the not for profit sector to provide significant funds in the absence of government resources to maintain the conservation or adaptation of heritage places[28].

[26]Australian Government, 2011, *State of the Environment Report p756*
[27]Australian Government, 2011, *State of the Environment Report* p730
[28]Australian Government, 2011, *State of the Environment Report p756*

3.3 A New Language and a New Direction

Today's 'experience economy' means that providing a point of difference is more important than ever before. There is a need to understand just what kind of experiences can make a real impact on visitors.

People are continually searching for meaning in their lives, something real, original or authentic. This can be in a product, a service or an experience, as well as looking for a sense of it within themselves. This trend is also likely to increase as travel increases and destinations become more similar.

The way visitors seek to engage is through:

Relationality - desire of tourists to form relationships with 'locals' offer a direct link to culture and heritage;

Interpretation - used to link historic, cultural and natural content to place, drawing on relational aesthetics, and creating stories that link places, their residents and visitors;

Eventfulness - historic and cultural events are already a major pillar in the tourism arsenal of destinations, but this is likely to increase in future as events take on a growing range of economic, cultural, social and image roles, and;

Journeys –heritage tourism is essentially about journeys. Not just because tourists by definition travel to experience heritage, but also because heritage itself is a journey – a voyage of discovery and self-realisation.

Being Part of a wider Brand Family

Heritage tourism could play a more visible role in the brand positioning of Australia, for example Tourism Australia, focusses on Indigenous culture and the Australian lifestyle more than our built environment. The aspiration of Brand Australia is to be:

The most desirable and memorable destination on Earth.

Tourism Australia 'invites the world to visit' with five key brand messages and therein lies an opportunity for **heritage to be incorporated into these five platforms** through:

- Transformation: giving a fresh perspective on the Australian story;
- Immersion: a new participative approach, not just observing;
- Adventure: journeys of discovery and surprise moments;
- Nature: the stories of the people behind the places; and
- Welcoming: a welcoming destination partner

Heritage tourism can underpin the
Tourism Australia strategy and niche programs –
by developing integrated experiences and story lines

Niche programs currently exist for the following 'Best of' Australia categories of:

- Luxury Lodges of Australia
- Great Walks of Australia
- Great Golf Courses of Australia
- Ultimate Winery Experiences of Australia
- Great Fishing Adventures of Australia
- Australia Wildlife Collection
- Discover Aboriginal Experiences

What is an Experience Brand and why is this important to Heritage Tourism?

Experience Brands **are at the heart of 'Brand Australia'.**

They bring it to life, create the motivation for visitors to visit Australia, and define its diverse character in some way potential visitors can understand. The **Experience Brands provide a competitive advantage that separates Australia from competitors**.

An Experience Brand therefore must be unique enough to stand out in the international marketplace and stimulate demand. **Each** *Experience Brand* **must have a clear consumer-led proposition** which ensures that a consistent approach is taken to the identification and development of memorable tourism experiences within these brands. Each Experience Brand must be distinctive in the international marketplace and differentiate itself from other Experience Brands and other destinations.

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What product development and experience delivery is needed if Australia is to become a market leader in heritage tourism?

What training and support is needed to be provided to heritage tourism operators to bring their sites to life?

If Heritage is to become a successful experience brand, it would need to:

- Be **grounded in the consumer** (travel values, social values and behaviours);

- Be **motivational** for international visitors;

- **Be of scale**- made up of a critical mass of related attractions and supporting experiences which are purchasable and accessible-supported by appropriate tourism infrastructure;

- Be **more than one experience**, and usually a combination of supporting experiences;

- Be **unified by a compelling story**- one which has international relevance;

- Be **capable of increasing dwell-time** and/or driving economic benefits;

- Have a **consumer-lead proposition**, values, etc; and

- Be **market-led** and tested.

4 Taking Action

Burra Heritage Trail, courtesy of Regional Council of Goyder

Unicorn Brewery 1873

This Discussion Paper has been prepared by the National Trusts of Australia to drive a national discussion on the untapped potential of heritage tourism in Australia.

Vision – Heritage Tourism Sector

World class heritage experiences showcasing and conserving Australia's unique historic, cultural and natural places and their stories

Guiding Principles

Successful Heritage Tourism creates an environment where:

• Significance of places can be conserved and protected by investing in people and place;

• Heritage can drive and strengthen the tourism story;

• Mutually beneficial partnerships can be fostered and grown;

• Enjoyable and enriching visitor experiences can be delivered through story telling;

• Customers are embraced at all levels as the greatest ambassadors;

• Commercially robust products, services and sustainable business models are established.

A Strategic Framework for Action

CREATE A STRONG VOICE THROUGH NATIONAL ALLIANCES AND PARTNERSHIPS	DEMONSTRATE THE SIGNIFICANCE OF HERITAGE TOURISM
BECOME A LEADER IN STORYTELLING	DEVELOP A NATIONAL HERITAGE TOURISM STRATEGY

Four Strategic actions are recommended:

1. Create a strong voice through National Alliances and Partnerships

Nationally, the heritage sector has no common voice or shared agenda to drive change, innovation or revitalisation. For the heritage tourism sector to grow it needs to adapt to the evolving and maturing needs of new visitor markets and to establish new partnerships. To identify common interests and explore new methods of collaboration the following actions are recommended:

Creation of a National Working Group on Heritage Tourism

A national Heritage Tourism Working Group needs to be established to help set a clear national direction and to facilitate an agreed policy agenda. Meeting bi-annually, the alliance could include:

- National Trusts of Australia

- Australian Heritage Council

- Indigenous Business Australia

- Australian Tourism Industry Association (collaboration of State Tourism Industry Council's)

- State Tourism Organisation

- Australian Regional Tourism Network

- Ecotourism Australia

- Tourism Australia

- Parks Australia

- Local Government

- Chairs and Officials of Australian, State and Territory Heritage Councils/ Departments

In addition to the Working Group, the partners can establish common priorities and agree on areas of collaboration (including the potential for a national conference).

Prepare a plan to guide national action on Heritage Tourism

Through the Heritage Tourism Working Group, agreement should be reached on the development of a national policy plan for heritage tourism, which includes:

- Defining the potential of the sector for growth and the role it plays in supporting regional economic and social development;

- Job creation;

- Heritage conservation management;

- The development of sustainable heritage tourism places and activities;

- A 2030 outlook to help set a long-term policy agenda for the Federal Government and the future strategic direction of the sector.

National Heritage Tourism Conference

Ongoing, regular connection and discussion between heritage stakeholders is essential for the successful sustainable positioning of the heritage tourism sector. The creation of a national conference to stimulate discussion between leading players to both support common interests and maintain a common voice for the sector. This event would be most effective as an extension of an existing event, such as the Ecotourism Conference.

2. Demonstrate the Significance of Heritage Tourism

There is currently little guidance or direction at either a national or state level on the role, function and economic and social potential of heritage tourism. The research gap on the total economic and social value of heritage tourism is constraining the ability to establish current and forecast future potential value to the Australian economy. To remedy this, it is recommended the following enablers are created:

A Dedicated Research Program

To quantify and demonstrate the economic and social values of heritage tourism, the heritage sector needs to take a leadership role by partnering with Tourism Research Australia, the Tertiary Sector and industry to develop a national research program. These partnerships can scope out, define and enable research to be undertaken on a regular basis to provide performance snapshots and quantify the value of heritage tourism to the Australian economy. Key metrics should include the identification of the type of activity and level of spend of heritage visitors, tracked over defined timeframes.

Annual Economic Impact Snapshot

Utilising the results of the dedicated research program, an economic and social impact statement outlining the following should be prepared:

Share of heritage visitors against the broader market (identified by activities undertaken)

Visitor expenditure (by day/night and by region)

This information will demonstrate the flow on benefits of heritage attractions to their destinations and can be prepared for national, state and local government through a partnership with operators.

3. Become Leaders in Storytelling

"Stories are what we remember; it is how we make sense of the world. It is what makes a human experience" – Nick Gray, Museum Hack.

The experience economy has redefined authenticity, storytelling and experiences as the foundations of successful tourism. While this is a new approach for some tourism products, it is the cornerstone of the heritage experience. The heritage sector can leverage this expertise to become the experts in storytelling, showcasing new techniques and linking with other attractions, partners and destination marketers to provide value and depth to regional narratives and assisting operators to hone the required skills. The following enablers will assist in achieving this strategic action:

Create a Storytelling Toolkit and Visitor Experience Development Workbooks for Heritage Tourism Products

Creating a Toolkit for Heritage attractions on how to create meaningful experiences and how to engage the guest in sharing their stories is an integral first step. This can be supported by a national showcase with events in every State and Territory.

Review and provide direction on Destination Unique Selling Points based on the local story

The key for the heritage sector is to learn to how link stories with the destination branding used in each location. Currently, destination branding is more often linked to natural features or climate. By creating linkages between the stories of a location and its destination brand, the heritage element can create unique experiences demanded by visitors.

Heritage can be made personal by focussing on the meaning of a historic place, as well as any connections it might have for domestic and international visitors. It is not just the architecture or physical space that enables a heritage place to leave an authentic impression, it is the role played by guides and custodians in sharing their stories.

Share Stories Locally

Storytelling is not only the foundation of visitor experience, but is integral to the identity and sense of place experienced by the host community. Not only does it act as an enabler for regional development and in conserving, maintaining and securing support for heritage places, but, importantly, it provides an opportunity to form strong partnerships with traditional owners. Heritage is an important element of any destinations unique selling proposition.

Silvery City Mint and Art Centre, Broken Hill, courtesy of Destination NSW

4. Prepare a National Heritage Tourism Strategy

Emerging new trends in the tourism industry call for attractions to use modern presentation skills to create truly unique experiences and transport visitors to a desired time and place. A competitive value proposition is needed for all heritage attractions if they are to compete with the wide variety of tourist attractions that already exist. The following actions are suggested:

Review the themes used in current Regional Tourism Strategies and Destination Management Plans

To gain an insight into current destination offerings, the heritage sector needs to undertake a review of all key experiences and destination themes contained within existing strategies and plans. This will enable a gap to be identified where heritage stories can be aligned and provide a value add to existing destination products and experiences.

Develop a National Heritage Tourism Strategy

A dedicated National Heritage Tourism Strategy needs to be prepared to guide heritage tourism opportunities across Australia.

Provide Best Practice Guidelines and Toolkits for industry partners

Heritage attractions should be a key part of the destination story, and use their experience and knowledge to act as mentors to other businesses on how best to leverage and embrace the local story and provide the key to unlocking authentic experiences. It is essential that Best Practice Guidelines and Toolkits are developed and provided to tourism businesses to activate the industry and demonstrate the value of heritage beyond events.

5 Next Steps

Courtesy of Thomas Ryan Photography

The Discussion Paper will be reviewed at a national summit which will be held at Burra in April. Following the Burra Summit, a series of pilot projects will be completed across Australia.

Once the pilot studies are completed and evaluated, a White Paper will be prepared. The White Paper will be presented to key stakeholders including the Commonwealth Government for endorsement and support.

Next Steps

STRATEGIC FRAMEWORK	2018	2019	2020
CREATE A STRONG VOICE **Establish Strategic Coordination and National Leadership**	• Burra Forum • Undertake initial meetings with State and Territory tourism agencies and Commonwealth Departments including Tourism Australia • Develop White Paper	• Establish a National Heritage Working Group • Heritage tourism opportunities recognised by States and Territories • Federal Government endorsement of White Paper • Documentation of national, state and Local Government grant programs • Develop a national policy agenda	• National conference established as a joint or standalone format • Tourism conference programs include cultural and heritage tourism as a key product discussion item • Heritage members appointed to national, state, regional and Local Government Tourism Boards
DEMONSTRATE ECONOMIC AND CULTURAL SIGNIFICANCE **Develop a Dedicated Research Program**	• Establish T.O.R for a national economic and social research program with TRA • Identify common tracking mechanism for visitation and spend at heritage sites	• Create a dedicated regional research program and barometer to track visitation • First statement of income and social significance established • Survey put in place for The National Trust to track visitation at a state and local level • Pilot program to test visitor surveys	• Database established of regional heritage attractions and visitor flows • All attractions have tracking mechanisms in place for type and visitor spend and visitor satisfaction
STORYTELLING **Become the Recognised Leader in Storytelling**	• Create an operators experience toolkit • Undertake six national experience development pilot programs across Australia • Experience Development Plan prepared for heritage tourism operators	• Six case study regions completed • Experience storytelling development kit shared with all heritage properties • Train the trainer programs created for volunteers and guides • Digital presence established and work book created to train operators	• Pilot projects and case studies prepared across Australia • Heritage tourism attractions start winning tourism awards at a local/region and state-level • Increased interest in storytelling from Local Governments
PREPARE A NATIONAL HERITAGE TOURISM STRATEGY **Develop a National Heritage Tourism Strategy**	• Develop T.O.R for National Heritage Tourism Strategy • Map heritage themes in existing tourism destination management plans	• National Heritage Tourism Strategy prepared • Audit of State and Territory tourism plans undertaken • Common cultural/ heritage themes established • Develop best practice guidelines for heritage tourism operators	• National Heritage Tourism Strategy in place • Destination plans start to incorporate dedicated themes on heritage tourism

Next Steps – Comments and Feedback

Your feedback is welcomed.

You are invited to provide comments and feedback on the key issues addressed in this discussion paper; following is a list of questions to help guide feedback.

Please send your comments and observations to Clare.Coburn@earthcheck.org

- What is needed if heritage is to develop a successful partnership with the tourism industry and meet the needs and expectations of modern visitor markets?

- What actions are needed and who does heritage need to partner with to develop a sustainable heritage tourism sector in Australia?

- What is Heritage Tourism and how should it be defined? (What can we learn from global experience?)

- Do the definitions of heritage tourism provided adequately describe the scope of heritage tourism activities and experiences?

- What do we understand about the social and economic benefits of heritage conservation to Australian society?

- What key social and economic performance measures should be used to monitor and measure our success?

- What are the shared interests of tourism operators, heritage managers and communities?

- How can heritage tourism and heritage conservation support each other?

- What type of visitor research is needed if we are to track and measure the success of heritage tourism? What indicators should be used as performance measures?

- Can heritage activity segments provide opportunities to increase visitor spend and length of stay?

- Where does heritage tourism fit in the experience economy?

- What are the current challenges to the successful development of heritage tourism in Australia?

- What product development and experience delivery is needed if Australia is to become a market leader in heritage tourism?

- What training and support is needed to be provided to tourism operators to bring their sites to life?

6 Appendices

Australia Day 2016 performance at WugulOra, courtesy of Destination NSW

Appendix 1: Strategic Context -State and Government Plans which influences and guide heritage tourism

This Discussion Paper aims to facilitate discussion regarding gaps and opportunities in the policy and decision-making frameworks for heritage tourism, which is currently an underachieving market segment with significant potential due to its demographic attraction of socially and environmentally aware travellers with a propensity to stay longer and spend more.

Heritage tourism is lacking cohesive and clear direction at both a National and State level on the role, function and potential of the sector. The following reports represent key milestones in the recognition of heritage tourism in Australia.

Creative Nation: Commonwealth Cultural Policy, 1994

This landmark report represents the first formal policy developed by the Australian federal government regarding culture. The report emphasises culture's importance to national identity and stresses the economic potential of cultural activity. While reference to cultural tourism exists in the Policy, it acted principally as the catalyst for the Draft Heritage Tourism Guidelines of 1999.

Environment Protection and Biodiversity Conservation (EPBC) Act (1999)

The EPBC Act of 1999 was responsible for establishing the National Heritage List in 2004, which now recognises the most significant Indigenous, historic and natural heritage values of more than 100 places across the country. While recognising the potential importance and impact of heritage tourism, the legislation acts as a guide to suitable use of significant sites.

Commonwealth Government's draft guidelines 'Draft Heritage Tourism Guidelines' (1999)

Supporting the EPBC Act was a guide to best practice in Heritage Tourism, the first of its kind published by the Australian Heritage Commission. The report used case studies to illustrate the potential for heritage tourism to play a role in conservation, as well as the need for management of visitation to places of heritage significance.

Tourism 2020 Strategy (2009)

The National Long-term Tourism Strategy (referred to as Tourism 2020) set the ambitious goal of doubling the value of visitor economy 2010 expenditure levels by 2020. The Strategy included reference to the potential for nature-based and cultural tourism, with little reference to the role of heritage. The Strategy put into place a mix of marketing and development strategies aimed at addressing the barriers to industry growth by providing a policy framework that assists industry with the tools needed to compete more effectively in the global economy.

Australian Heritage Strategy (2015)

As one of Australia's key heritage priorities, the strategy provides a nationally driven strategic direction for heritage management to be implemented across all levels of government and the community for the next ten years. It outlines the vision that our natural, historic and Indigenous heritage places are values by Australians, protected for future generations and cared for by the community, and sets strategic objectives to achieve this.

Implementing the Australian Heritage Strategy, Commonwealth of Australia (2016)

This report charts considers the current progress made implementing the 2015 Australian Heritage Strategy, mapping out the delivery of the work and the those responsible in the future.

National Trusts of Australia, Strategic Plan (2015-2018)

The plan provides an overview of the National Trusts' strategic directions and key areas of focus. It is the Strategic Plan that calls for the development of this Direction Paper. The strategic plan outlines the goals of the NTA becoming a co-ordinated and effective advocate for heritage conservation at the national and international level, and proposes key strategies and initiatives.

State Cultural and Heritage Strategies (2006-2022)

Various states have prepared Heritage & Culture Strategies with reference to tourism. They each provide an overview of strategic objectives with an overarching theme to encourage engagement and collaboration amongst state bodies and stakeholders within heritage to encourage understanding and appreciation of the heritage.

State Ecotourism/ Nature-based Tourism Strategies

State departments, Australia-wide, have prepared individual ecotourism strategies, occasionally referred to as nature-based tourism strategies, to manage and provide guidance to tourism operators within this market. There is an emphasis placed on sustainable tourism to combat threats to the states' biodiversity and ecological community, hoping to increase the resiliency of natural areas.

Aboriginal and Torres Strait Islander Heritage Protection (ATSIHP) Act (1984)

The ATSIHP works to protect areas and objects of significance to Aboriginal people. It also allows the Environmental Minister, on the application of an Aboriginal person or group of persons, to make a declaration to protect an area, object or class of object from destruction.

State (NSW/ VIC/ WA) Indigenous Tourism Strategies

Some state departments have formed Indigenous tourism strategies to support the sector, creating economic and social benefits for Aboriginal people as both operators and employees. The state departments have identified the potential to create a greater understanding and appreciation of the diversity and richness of Aboriginal culture. The documents act as foundations for the development of Aboriginal participation in an industry (tourism) that can deliver long-term and far-reaching benefits for all those involved.

State Destination Management / Visitor Economy Plans (2012 – 2020)

Across Australia, State Tourism Organisations have been working with their destinations to prepare Destination Management Plans (referred to as Visitor Economy Plans in some areas) to link the aims and objectives of each destination to the Tourism 2020 targets and strategies. Local Government has followed suit, preparing Visitor Economy and Tourism Strategies that align to the 2020 Targets. Many of these plans make reference to the important role of heritage tourism.

British National Trust Strategy

This strategy provides an overall view of the strategic directions, signifying how to combat the major challenges of preserving places of historic interest in the 21st century. The strategy looks at key factors which are important for the national trust to consider and how they will increase initiative and work with others to achieve their goal.

The Burra Charter: the Australian ICOMOS Charter for Places of Cultural Significance (2013)

The Charter provides standard rules of practice for parties who provide advice, make decisions and/or undertake work in places of cultural significance. Periodically reviewed to allow for evolving understanding of the theory and practice of heritage management.

National Tourism Taskforce (2003) Going Places: Developing natural and cultural heritage tourism in Australia for the Environment Protection and Heritage Council

This taskforce identified a series of opportunities and barriers for tourism and heritage. It identified key issues as product development, managing tourism at natural and cultural heritage places, planning and coordination and supporting people and products though a review of resource documents and stakeholder consultation.

Australian Heritage Commission (2001) Australian Historic Themes: A framework for use in heritage assessment and management

This document outlines a research tool for use across national, state or local contexts to assist in the identification, assessment and management of heritage places.

Victorian Parliamentary Report (2014)

This report outlined the heritage related activities of the Victorian Parliament and services. An implementation strategy was developed for the 58th Parliament based on a workshop to increase the value of the physical and cultural heritage of Parliament for the period 2015-2018.

Australian Heritage Commission, Department of Industry, Science and Resources, CRC Sustainable Tourism (2001) Successful Tourism at Heritage Places: A Guide for Tourism Operators, Heritage Managers and Communities

Based on an exploration of issues of common concern regarding the responsible use of Australia's heritage places for tourism, this guide provides information to help people clearly understand the issues involved and includes practical pointers for those aiming for sustainable tourism at heritage places.

Cooperative Research Centre (CRC) Sustainable Tourism (2008) Culture and Heritage Tourism: A Growing and evolving industry in Australia

This documents highlights the importance between tourism and future product development opportunities in relation to cultural heritage assets, sites and localities, and is intended to be of value to both policymakers and managers of cultural institutions. This document provides an overview of issues, opportunities and also provides a framework for key factors associated with successful cultural heritage tourism operations based on the examination existing research and best practice.

Cobb and Co corner house (Midnight Oil house), Burra, courtesy of Goyder City Council