



Australian Heritage Tourism

Directions Paper



June 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 heritage².

This Directions 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

Economic, Social and Environmental Benefits

Gains from heritage tourism are amplified throughout the global economy with economic, social and environmental 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 activities³. A dedicated national 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 have grown 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.

¹Tourism Research Australia, IVS YE September 2017

²United Nations World Trade Organisation, *2016 Annual Report*

³Tourism & Transport Forum Australia, *Built Heritage and the Visitor Economy- The case for adaptive re-use of heritage assets* (2017)

⁴Tropical 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 places 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 cultures⁴. Excelling in the art of storytelling and using innovative presentation skills to connect the visitor to a desired time and place are essential for Australia's heritage tourism attractions to compete on a global scale.

The Opportunity

Vision for Australia's Heritage Tourism Sector

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

Vision for The National Trust

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

Guiding Principles

Successful heritage tourism creates an environment where:

- Authenticity and significance of heritage places can be conserved, protected and shared by investing in people and place;
- Heritage can deepen, drive and strengthen the tourism story;
- Mutually beneficial partnerships can be fostered and grown;
- Enjoyable and enriching visitor experiences can be delivered through engaging story telling;
- Customers are embraced at all levels as our greatest ambassadors;
- Commercially robust products, services and sustainable business models are established; and
- Skills and capacity are nurtured and fostered, particularly in regional Australia.

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 Directions Paper advocates for a number of strategic initiatives to establish a national agenda.

The following four strategic initiatives 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 will take a leading role in advocating and implementing these initiatives through their network of more than 300 heritage properties across Australia and by working with other heritage tourism operators.

1. Create a strong voice through national alliances and partnerships

Strategic co-ordination and clear leadership is needed to drive a heritage tourism agenda. To build national support for this agenda, a National 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 national forum 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 economic, social and environmental benefits of heritage tourism

A dedicated national tourism research program is needed to inform business planning, provide strategic insights for product development and marketing and demonstrate social, environmental 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, environmental and social contribution of heritage tourism and to benchmark and monitor the changing needs and expectations of visitor markets.

3. Develop the skills and capabilities of heritage tourism operators

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 dissemination of training and learning resources and visitor experience development plans for heritage places by the National Trust will help support this new trend and build capacity within the industry. The National Trust will lead the heritage sector in demonstrating 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. The Strategy will also guide future private and public investment in heritage tourism infrastructure.

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Paddington Reservoir Gardens, courtesy of Destination New South Wales

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1 Setting the Scene



Tattersalls Lane, Melbourne, courtesy of Visit Victoria

This Directions 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.

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 economy⁵. 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 decades⁶.

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 2030⁷, 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 markets⁹. The richness of its heritage experiences, particularly Indigenous culture, represents a key part of Australia's appeal.

With a growing international market and a diverse range of unique heritage places and experiences, 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 Trusts in Australia are one of the most significant owners and operators of heritage places with more than 300 properties nationwide, including a number of sites recognised on the National Heritage List. The National Trust is well placed to promote the value of heritage places through engaging storytelling and unforgettable experiences leading visitors on journeys through Australia's stories which reach beyond the bricks and mortar of individual places.

Heritage tourism provides an excellent opportunity to showcase heritage places across Australia, to increase understanding and support for their conservation and to promote innovative contemporary uses for our heritage assets.

⁵World Travel and Tourism Council, 2017, Travel and Tourism: Economic Impact 2017 World

⁶UNWTO, Tourism Highlights 2015 edition

⁷United Nations World Tourism Organisation, *Tourism Towards 2030/Global Overview*, 2011

⁸United Nations World Organisation, *UNWTO Tourism Highlights 2017 Edition* (14)

⁹South Australian Tourism Commission, April 2017, International Market Profile: India

*Robert H. McNulty, founder and president of Partners for Liveable Communities, is known primarily for persuading local officials to view public and private partnerships as a resource for revitalising cities in the Americas. He specialises in economic renewal focusing on planning, design and quality of life to improve communities.

1.2 Understanding Heritage Tourism

What is Australia's heritage?

Australia has a rich natural and cultural heritage that underpins a 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 values¹⁰.

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

Interpretation, celebration and commemoration of 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 places, 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.

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

What is Heritage Tourism?

Globally tourism is becoming more about journeys and experiences than simply viewing or visiting places 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 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):

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

While there is ongoing discussion on the scope and definition of heritage tourism, for the purpose of this Directions Paper, the following is offered 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 Directions Paper recognises that heritage tourism is intrinsically 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 in Australia.

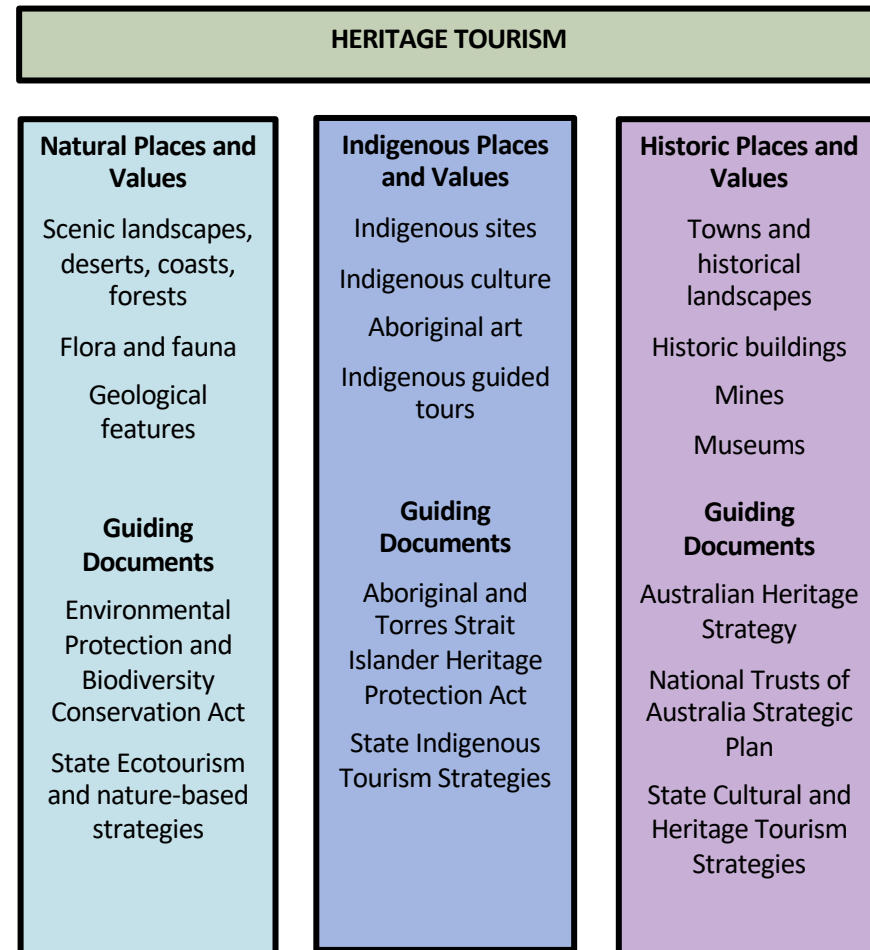


Figure 1: Scope of heritage tourism:

1.3 Heritage Governance, the National Trust and Tourism

Heritage listings 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 with best case practices gaining international exposure. The Australian Government has responsibility for the identification, protection and in some cases management of those heritage assets inscribed on the World Heritage List, those inscribed on the National Heritage List and on the Commonwealth List. The Australian Heritage Council is the key advisor to the Minister for the Environment and Energy on heritage matters.

State, Territory and Local Governments, as well as private property owners, have responsibility for the day to day management of many heritage 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 experience and understand it grows. On the supply side, more heritage places are looking for ways to assist with the preservation and presentation of their stories through the development of economic uses of heritage places.

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 natural, built and cultural heritage through advocacy, education, care and custodianship of heritage places and traditions.

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 directly employing more than 350 people nationwide. The Trusts are supported by an Australia-wide membership base of 60,000 people. They are part of an international network of National Trust organisations with more than 5 million members worldwide.

BRICKENDON



WOOLMERS



CLARENDON



Convict Heritage sites Brickendon, Woolmers and Clarendon 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.

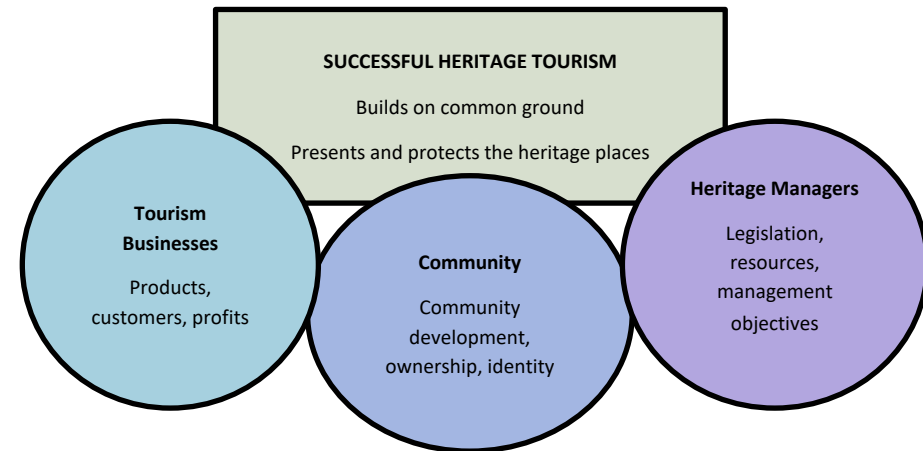


Figure 2: The potential benefits of heritage tourism (sourced from Successful Tourism at Heritage Places, 2001).

Guiding Principles

Successful Heritage Tourism creates an environment where:

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- Heritage can deepen, drive and strengthen the tourism and national story;
- Mutually beneficial partnerships can be fostered and grown;
- Enjoyable and enriching visitor experiences can be delivered through engaging story telling;
- Customers are embraced at all levels as our greatest ambassadors;
- Commercially robust products, services and sustainable business models are established; and
- Skills and capacity are nurtured and fostered, particularly in regional Australia.

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

1.4 Building on Common Ground for Heritage Tourism

Authentic storytelling forms a key part of tourism globally 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 activities¹³.

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.

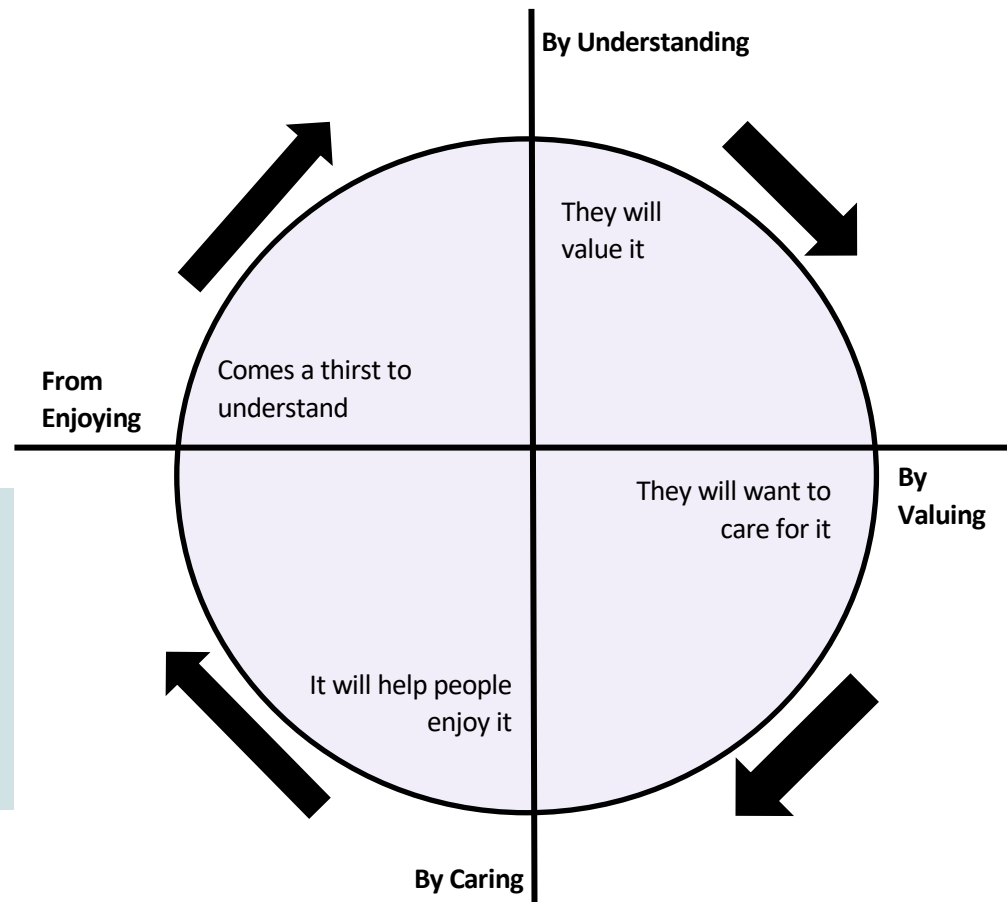


Figure 3: The Heritage Cycle by Simon Thurley

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

2 Visitor Research and Trends



Great Cobar Heritage Centre, courtesy of Destination New South Wales

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

In practical terms, when examining market trends in tourism, it is currently only possible to examine the cultural heritage tourism activities that are reported on through the National and International Visitor Surveys conducted by Tourism Research Australia.

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	<ul style="list-style-type: none"> Go whale or dolphin watching Visit national parks/ state parks Visiting botanical or other public gardens Bushwalking /rainforest walking
Culture	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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.

Further work is required to develop more nuanced understandings of the relationships between cultural, heritage and nature-based tourism markets and experiences.

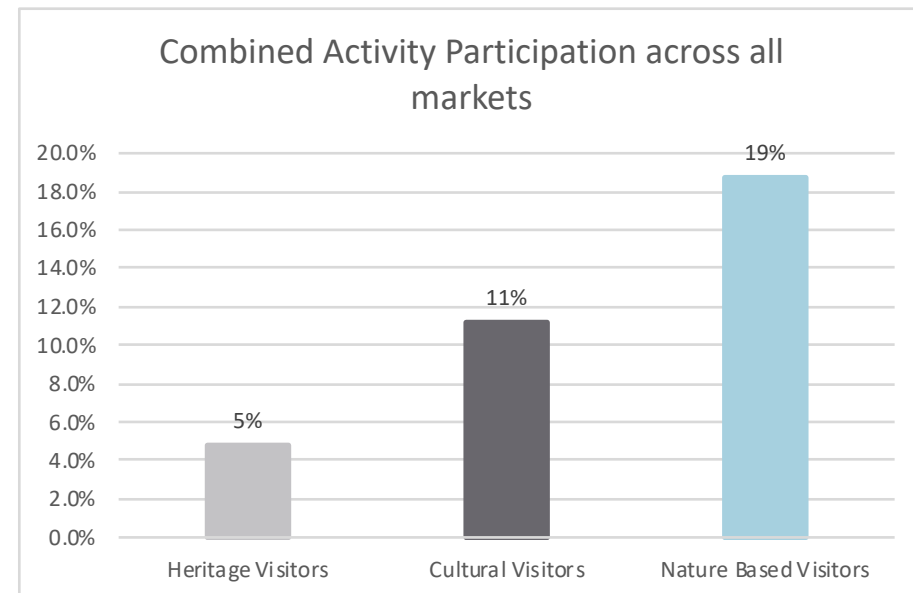


Figure 4: Visitor activity segment participation by combined international and domestic visitors.

2.1 Cultural, Heritage and Nature-based Activities

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 ecotourism industry.

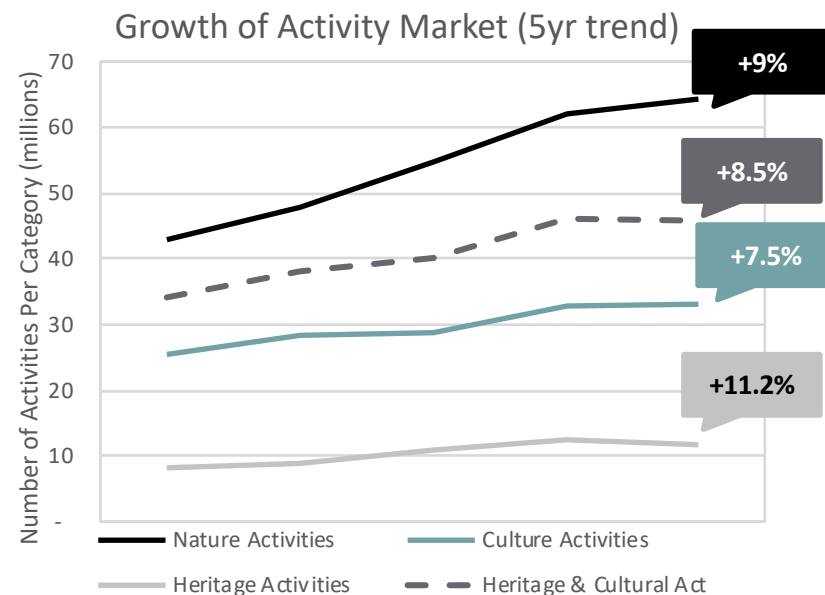


Figure 5: Growth rates in Tourism Australia's Activity Segments

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: Domestic and International 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%
Cultural Heritage		2014	2015	2016	2017	Trend
	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)

The following slides are sourced from the most recent research from Tourism Australia's Consumer Demand Project. The research provides a snapshot on:

- Key factors when choosing a destination
- Most important factor by country
- Desired experiences and where heritage sits with consumer expectations

2.2 Top 5 importance factors when choosing a destination

The Top 5 importance factors for international travellers when choosing a destination have been explored by Tourism Australia; Safety & Security are still the most important factor on a top 5 basis, while Rich History, World Class Coastlines, Friendly Citizens and are growing strongly.

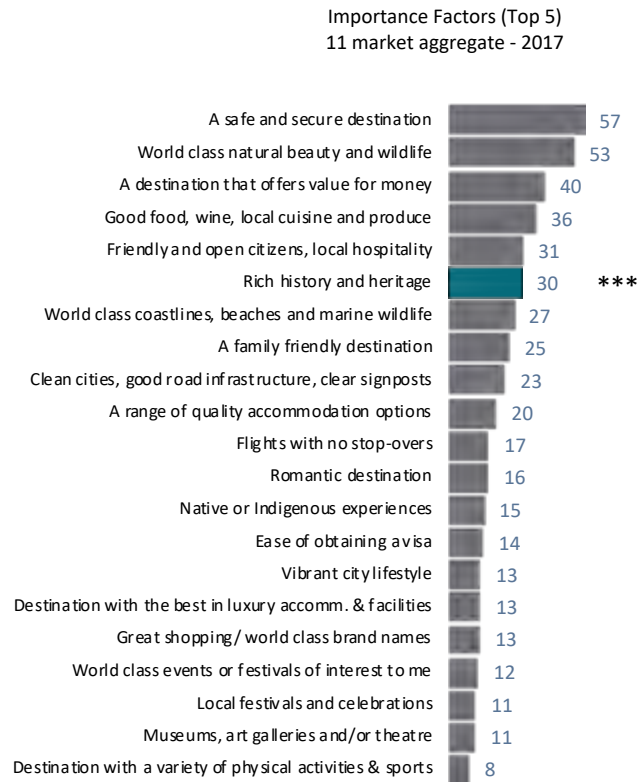
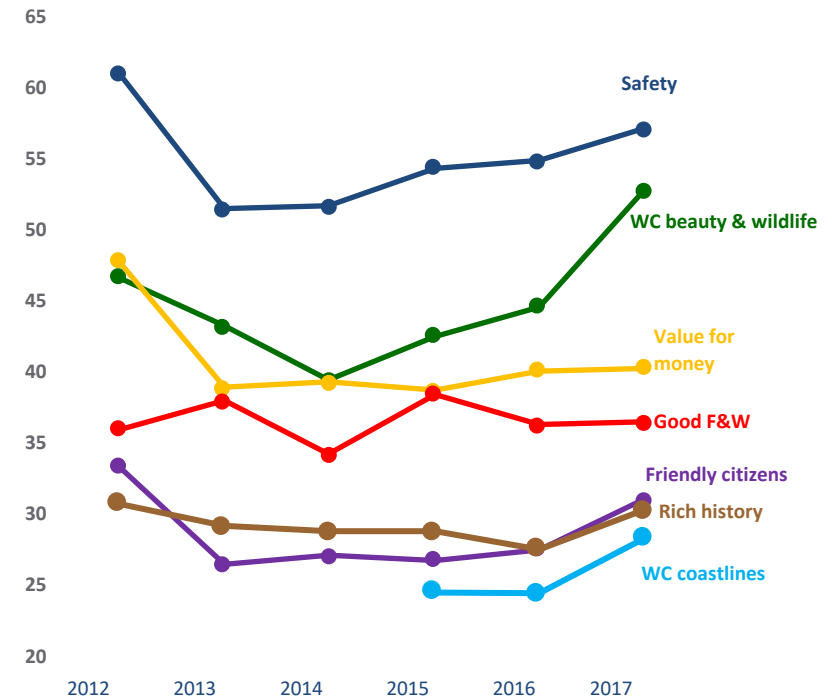


Figure 6: Importance Factors of International Visitors

Importance Factors (Top 5)
11 market aggregate



Note: Historical data re-weighted for World Class coastlines due to change in question methodology

Figure 7: Importance Factors of International Visitors: Top 5 trends

Questions: Thinking about choosing a holiday destination to another region, which of the following factors is most important to you? (please rank up to 5). Average includes 11 key markets: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

2.2 Most important factor by country

Various source countries for international travellers to Australia have both similarities and differences in their weighting of importance factors when choosing a destination; Safety & Security and Nature/ Wildlife share #1 across all origins. Food & Wine are in top 5 for the vast majority and Aquatic & Coastal most important for China and India. History and Heritage are 6th overall and in the top 5 for NZ, Korea and Japan. Museums / galleries / theatre are important to 11%, highest for USA and Japan.

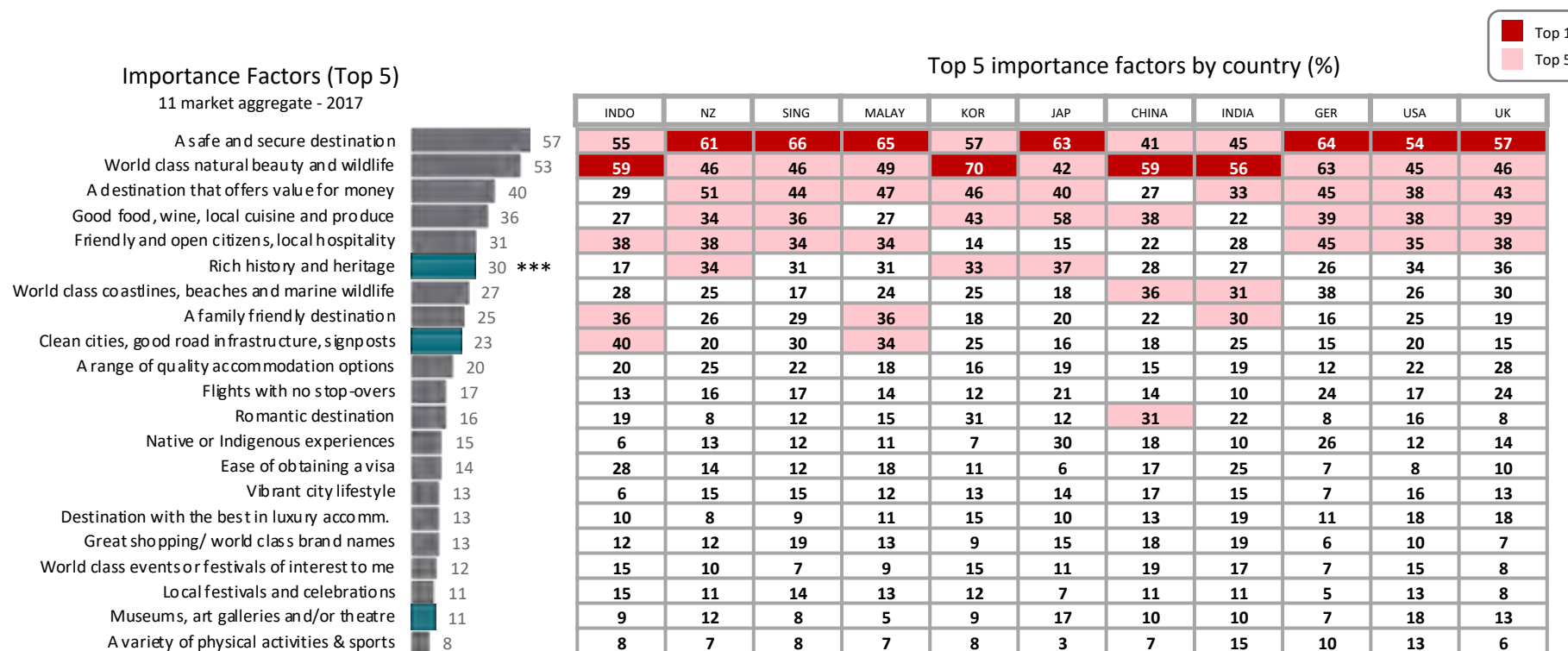


Figure 8: Importance Factors of International Visitors

Figure 9: Importance Factors of International Visitors

Questions: Thinking about choosing a holiday destination to another region, which of the following factors is most important to you? (please rank up to 5). Average includes 11 key markets: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

2.2 Desired experiences on an Australian holiday

This word cloud represents the most common responses from all international markets regarding their desired experiences during an Australian holiday; this highlights that experiencing local culture is amongst the most highly desired experiences, and historical places are also desired.



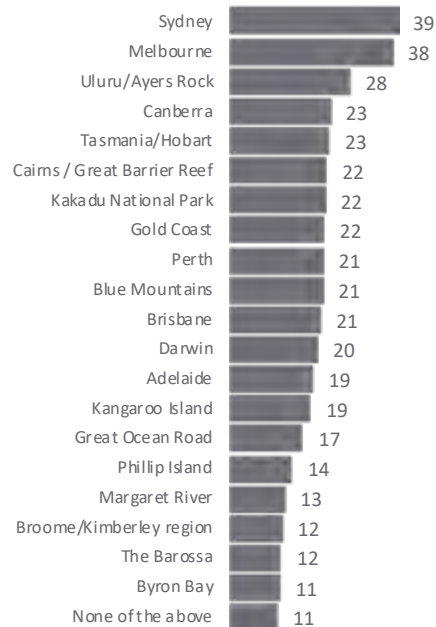
Figure 10: Most common desired experiences by international visitors to Australia

Question: If you were to visit Australia, what type of experience would you most like to do? (open-ended response).

2.2 Australian Destination Association: History & Heritage

According to research undertaken by Tourism Australia, Sydney, Melbourne and Uluru are the leaders for history and heritage. These are the top 3 for all origins. Uluru leads for NZ and Germany. Canberra is prominent, while Cairns / GBR 6th overall and in the top 5 for Japan, Germany and the UK.

Australian destinations associated
% of Aus considerers in 11 international countries



Association by country (%)



INDO	NZ	SING	MALAY	KOR	JAP	CHINA	INDIA	GER	USA	UK
38	38	28	31	36	35	43	44	38	56	50
33	44	33	34	32	33	36	45	31	47	37
18	45	25	23	8	19	20	24	45	20	49
27	18	18	18	27	23	29	31	23	20	24
23	34	24	23	9	12	17	24	21	21	25
19	20	21	17	13	23	25	28	25	25	33
26	24	19	20	13	12	24	28	24	17	25
23	9	19	19	16	16	33	34	15	29	31
24	15	22	23	8	15	21	34	16	26	30
18	23	22	20	19	11	20	31	18	18	25
22	14	17	18	19	18	23	33	18	27	23
24	21	18	16	9	15	29	24	15	19	25
17	23	15	17	7	9	17	32	19	21	25
24	9	16	17	13	8	26	35	12	20	20
18	12	17	16	12	6	17	30	15	19	18
19	8	14	13	9	4	17	27	12	13	17
12	12	14	10	7	3	16	22	8	10	12
13	12	10	10	6	3	16	19	8	10	17
9	13	10	8	6	2	16	21	7	13	15
12	9	9	7	6	3	16	19	8	13	20
6	17	15	9	15	15	4	3	15	12	14

Figure 11: Australian destination associated by international visitors **Figure 12:** Australian destination associated by international country

Questions: Which of these Australian destinations do you associate with [factor]? Average includes 11 key markets: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

2.3 Domestic Patterns

Domestic visitor motivations for travel are not as closely monitored and explored as international motivations; however, domestic visitation is understood to be largely driven by different motivations than international travellers to Australia, or outbound international travel by Australians. Described as “we holiday at home, but we explore the world”¹⁴, travel decisions by Australians are significantly impacted by demographics, financial constraints, and the purpose sought from the holiday experience.

For those seeking experiences in their holidays, there is a key divergence in the effect that key factors attracting international visitors, such as safety and security, have on the domestic market. Domestic travellers tend to see holidays within Australia as “safe, predictable and known”, and more expensive than travelling overseas¹⁵.

This value for money and financial constraints is integral to driving domestic travellers overseas. Younger generations are faced with competing goals of home ownership or travel, often forgoing one for the other – this has the effect of driving an emphasis on quality experiences, with 75% of Australian millennials committing to seeking our personalised experiences or education rather than material goods¹⁶.

The older generation is exhibiting a different style of travel; Baby Boomers have greater financial security and capacity and they are travelling more than other generations. 61% of Baby Boomers travelled domestically per year, while 32% commit to outbound international travel¹⁷.



Great Barrier Reef, courtesy of Tourism Australia

¹⁴TNS Australia, 2015, Domestic Summary

¹⁵ Gardiner and Scott, 2015, Australian Tourism Demand for Domestic Travel Experiences: Insights for the Gold Coast, Griffith Institute for Tourism Research Reports Series

¹⁶Robin, M, 2017, How Millennials will shift Australia's Spending habits: Macquarie, Sydney Morning Herald

¹⁷ Campaign Brief, 2013, Mi9 Report: Australian's Baby Boomers enjoying lucrative lifestyle stage worth an average \$1M per household but being shunned by brands

2.3 Domestic Patterns

Domestic travel is broadly seen largely as driven by a chance to “disconnect and reconnect”, allowing travellers to de-tech, slow down from normal fast-paced lifestyles and foster a more personal connection to families and places¹⁹. Domestic travellers within Australia are seeking authentic experiences that connect them to a place, let them try something new, being part of an iconic Australian event, or indulging a passion²⁰.

Seeking relaxation and rejuvenation during their holidays, domestic travellers are most likely to travel for events or festivals (including cultural, food and wine or those with a historical focus) which allows them to learn something new²¹.

Over 9 million domestic travellers engaged with heritage-specific activities in 2017. These travellers were worth over \$12 billion to the Australian economy and represented 77% of all engagement with existing heritage tourism products²². When viewed in through the lens of “Heritage and Culture” activities as outlined earlier in this report, over 30 million individual trips made by Australian domestic travellers involved heritage and culture activities.

7.8% of all domestic day visitors and 15.9% of all domestic overnight visitors engaged with heritage and culture activities during trips made in 2017²³.



¹⁸ TRA, YE Sept 2017

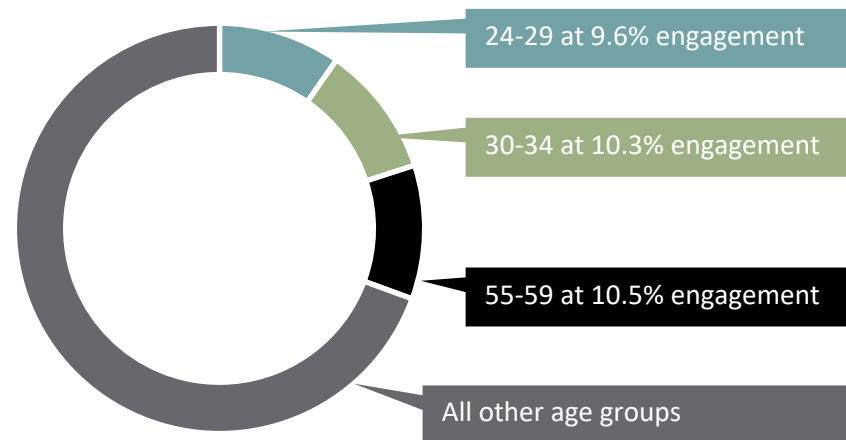
¹⁹ Campaign Brief, 2013, Mi9 Report: Australian's Baby Boomers enjoying lucrative lifestyle stage worth an average \$1M per household but being shunned by brands

^{20, 21, 22} Tourism Australia and TNS, 2013, Domesticate Summary

²³ TRA, YE Sept 2017

Key Domestic Demographics for Heritage Tourism

There are four significant age groups which show higher engagement than all other age groups across domestic heritage tourism activities.



Fastest growing age groups engaging with heritage tourism activities in the past five years have largely been younger generations¹⁸:

- 20-24 year olds' engagement increased by 10.9%
- 24-29 year olds' engagement increased by 12.3%

No demographics demonstrated a decline in engagement, suggesting two considerations. Either the availability of heritage product has increased over the past five years, or interest in heritage product has increased in conjunction with the desire to seek out authentic experiences.

2.4 Opportunities for Growth

Together, cultural and heritage activities are rapidly approaching the scale 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 13, below, outlines the difference in visitors numbers to 2030 between a natural growth scenario and a scenario of growth driven by investment and experience development.

Investment in product development, experience development and a focus on collaboration has the potential to increase cultural and heritage tourism visitors by an additional 25 million in 2030 above expectations of natural growth. This growth scenario illustrates the significance of a 6% growth in each market segment.

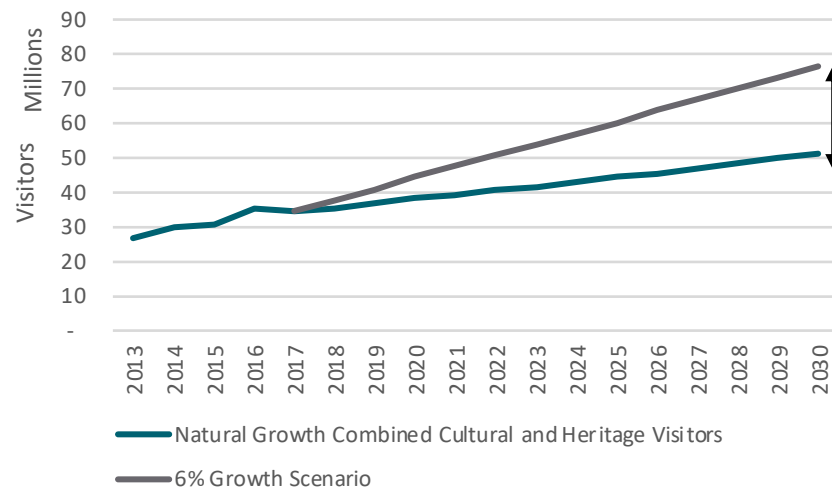


Figure 13: Potential additional cultural and heritage visitors above natural growth as a result of experience development activities

Fast Facts: The Cultural Heritage Market in Australia



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



The total heritage and cultural market in Australia is worth \$32.2 billion in 2017; International visitors provide roughly \$17 billion of this, while domestic visitors represent just over \$15 billion

2.5 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 education²³ with an interest in learning and exploring new concepts.²⁴ The heritage visitor spends more and stays almost twice as long than other international visitors.²⁵ 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.

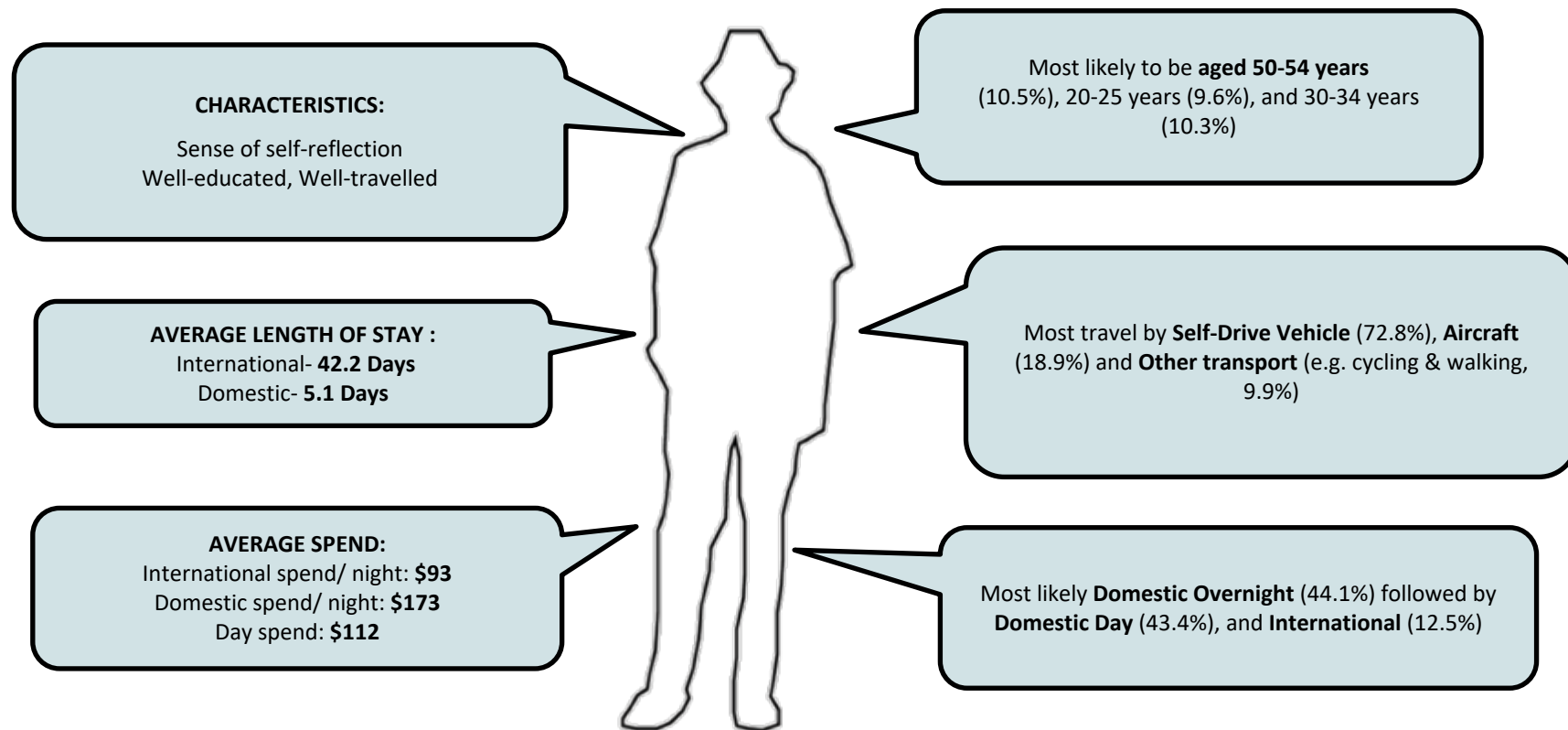


Figure 14: Characteristics of the typical heritage visitor (TRA NVS and IVS YE September 2017)

²³Katstenholz, 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

²⁴Alzua, 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

²⁵Tourism Research Australia IVS YE Sept 2017

2.6 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 want²⁶:



- **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 seeking²⁷:



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

²⁶Tourism Australia, 2012, *Australia’s National Landscapes Program: Experience Development Strategies*

²⁷Fáilte Ireland, *Global Segmentation Toolkit*

Picture 1: Claredon, Tasmania: Penny farthing races, Picture 2: Fleurieu Peninsula, courtesy SATC

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

2.7 Understanding Visitor Market Motivations and Information Needs

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 and heritage experiences. There is a transition from traditional holidaymaking and sightseeing, with visitors wanting to be captivated and immersed in cultural places. This has been reflected in the awareness and deliberateness of destination selection, with TripAdvisor "TripBarometer – Traveler Trends and Motivations" (Figure 15) demonstrating that almost a third of visitors consciously make a choice based on potential cultural experiences²⁸.

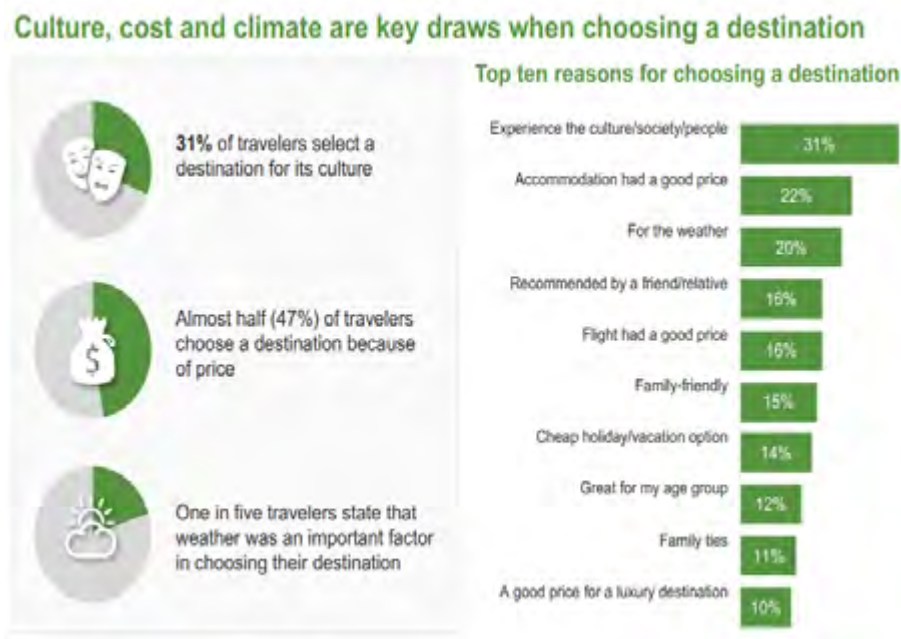


Figure 15: Visitor methods of booking trips (as compiled by TripAdvisor)

²⁸ TripAdvisor, *TripBarometer- Traveler Trends & Motivations Global Findings*, 2016

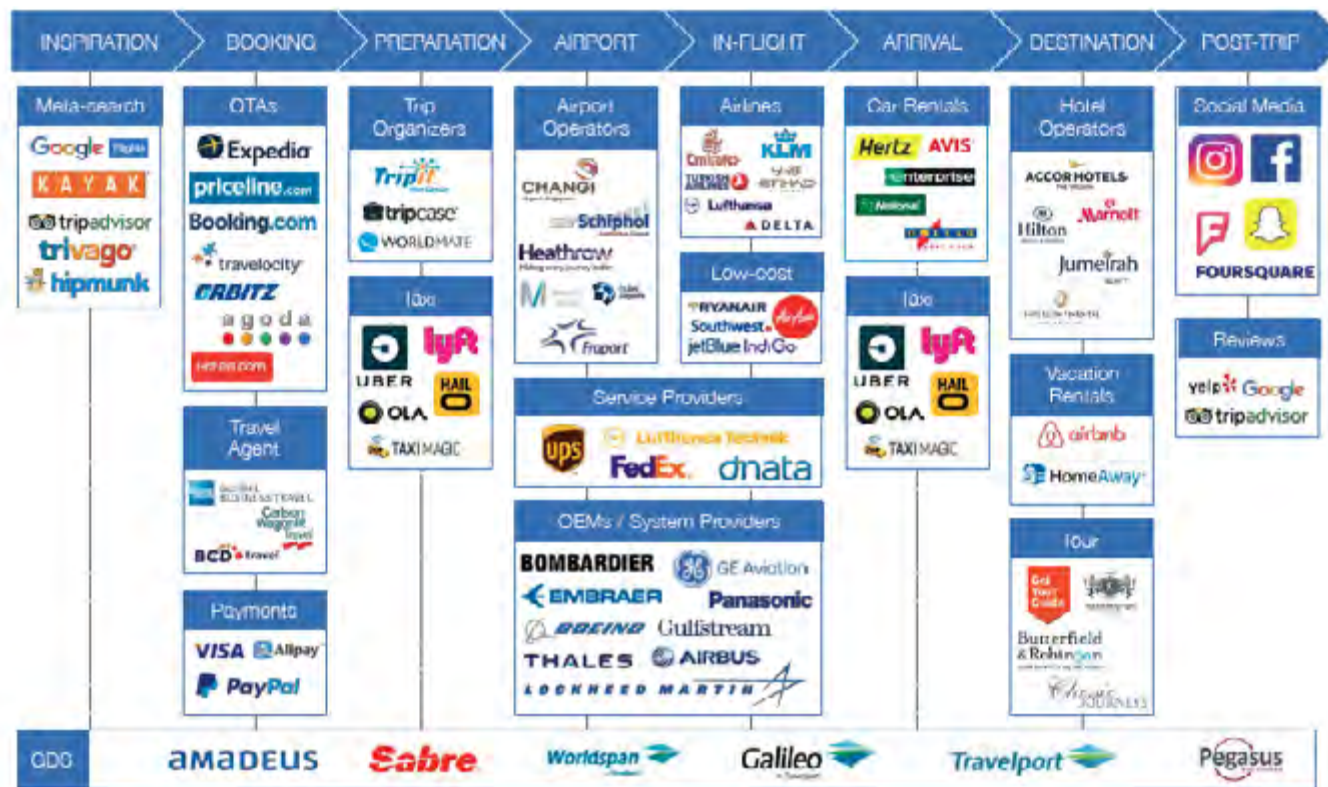
Tourism is becoming more about journeys of discovery and self-realisation through interactive engagement with creative narratives. This hands-on approach is prompting a shift away from static places and monuments and is seeing higher demand for the following elements of heritage tourism:

- 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.



2.8 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.²⁹ 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 sector³⁰.



Source: World Economic Forum/Accenture analysis

Figure 16: The “visitor ecosystem” as presented by the World Economic Forum

²⁹Go, 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)*

³⁰World Economic Forum, *Digital Transformation Initiative- Aviation, Travel and Tourism Industry*, 2017

2.9 The Trip Cycle and Visitor Engagement Journey

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 17:



Figure 17: The visitor relationship cycle³¹

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.

³¹ Outbrain, 2016, Is your summer content dream-worthy?

3 Challenges and Opportunities



The Maria Island walk, Tasmania, courtesy of Tourism Australia

3.1 Heritage Tourism: The Challenge

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 place 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 places 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 between heritage tourism operators.
- **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 appears to be 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 practice that is not committed to sustainable development of heritage experiences.
- **There appears to be a distrust of heritage managers** - 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 places in tourism packages.
- **Lack of data capture** - Lack of technology and tools in which to capture data, visitor feedback and track experiences throughout the five stages of travel. Missing within this component is also the inability to connect into other supportive tourism channels, or harness the ability to deepen the experience and story to ensure ongoing connection to the heritage journey.

3.1 Heritage Tourism: The Challenge

- **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 values. A contemporary understanding of the needs of the new visitor economy and the role played by the tourism industry needs to be developed amongst heritage tourism operators.
- **Storytelling comes naturally** – while the growing trend in customer engagement towards storytelling is perfectly suited to many heritage places and their managers a wide number of places 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 economy.



Nura Diya Aboriginal Discovery Tours, courtesy Destination New South Wales

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 investment in 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 that government assist with other support.

There are also legal impediments in directing Commonwealth funding to be heritage places that are 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 figures³². This is considered due to a lack of policy emphasis on the value of heritage places³³ 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 support the conservation and/or adaptation of heritage places³⁴.

³²Australian Government, 2011, *State of the Environment Report* p756

³³Australian Government, 2011, *State of the Environment Report* p730

³⁴Australian Government, 2011, *State of the Environment Report* p756

3.2 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' offering 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 as well as the 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

3.2 A New Language and a New Direction

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.



High Country Harvest Festival, courtesy Tourism Victoria

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

- Be **grounded in the consumer demand** (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 or network of supporting experiences;
- Be **unified by a compelling story**- one which has international relevance;
- Be **capable of increasing length of trip** 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

4.1 Vision, Guiding Principles and Strategic Frameworks

Vision – Heritage Tourism Sector

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

Objective

To create an experience brand for Australian heritage tourism where:

- Authenticity and significance of places can be conserved, protected and presented by investing in people and place;
- Heritage can deepen, drive and strengthen the tourism story;
- Mutually beneficial partnerships can be fostered and grown;
- Enjoyable and enriching visitor experiences can be delivered through engaging story telling;
- Customers are embraced at all levels as the greatest ambassadors;
- Commercially robust products, services and sustainable business models are established.
- Skills and capacity are nurtured and fostered, particularly in regional Australia.

A Strategic Framework for Action

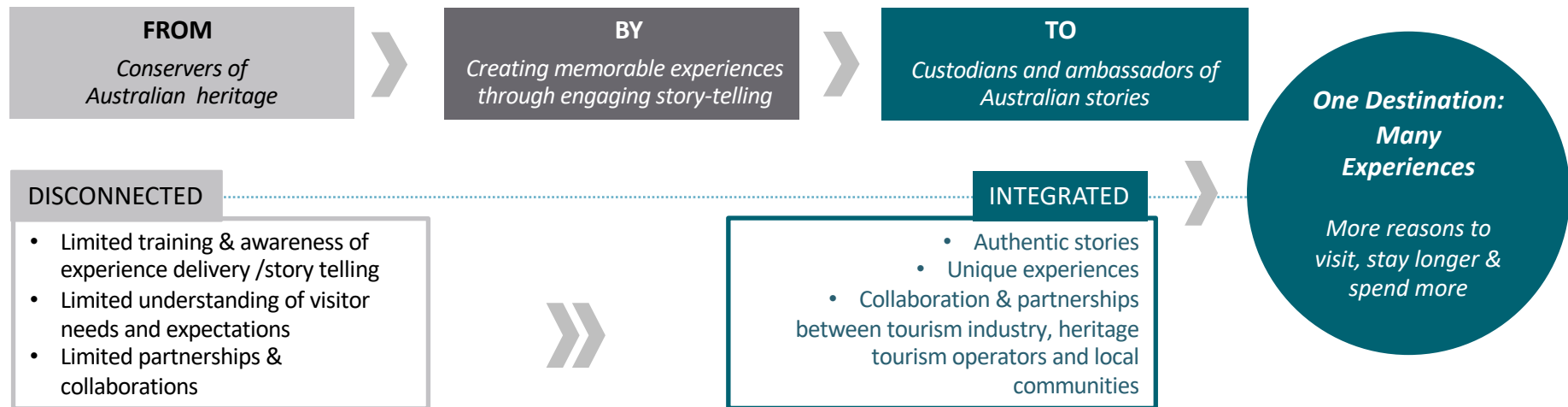
CREATE A STRONG
VOICE THROUGH
NATIONAL ALLIANCES
AND PARTNERSHIPS

DEMONSTRATE THE
SIGNIFICANCE OF
HERITAGE TOURISM

DEVELOP THE SKILLS
AND CAPABILITIES OF
HERITAGE TOURISM
OPERATORS

DEVELOP A NATIONAL
HERITAGE TOURISM
STRATEGY

Recommended Strategic Directions



The following four strategic directions are recommended:

1. CREATE A STRONGER VOICE THROUGH NATIONAL ALLIANCES AND PARTNERSHIPS

*Establish a National Working Group/Alliance and form **key partnerships** within the sector and with the tourism industry to drive operational efficiencies, adapt to the changing needs of customers and explore new methods for collaboration, innovation and business development.*

2. DEMONSTRATE ECONOMIC, SOCIAL AND ENVIRONMENTAL SIGNIFICANCE THROUGH ESTABLISHING A DEDICATED NATIONAL RESEARCH PROGRAM FOR HERITAGE TOURISM

Establish a dedicated national research program to collect and collate strategic data which can be used to inform business planning, marketing and planning.

3. DEVELOP THE SKILLS AND CAPABILITIES OF HERITAGE TOURISM OPERATORS

Heritage tourism operators need the skills and networks to support a transformation of visitor experience to meet the expectations of contemporary and future tourists.

Training and learning resources for new interpretation and story telling methods and linking with other destinations and destination marketers to ensure that there are consistent quality standards amongst operators.

4. DEVELOP A NATIONAL HERITAGE TOURISM STRATEGY

Develop a three Year National Heritage Tourism strategy that aligns the efforts of the various partners into a definitive plan of action. Capitalise on changing market needs to position heritage tourism for sustainable growth.

STRATEGIC DIRECTION 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. This will require a unified voice and agreed messaging, including the challenge of deciding who is the appointed lead for heritage tourism. Ecotourism provides a good governance model to follow where a collective product entity has driven success through a national leadership team and an accreditation scheme, all borne from the initial establishment of an industry working group.

Aim: Establish a national working group or **alliance of organisations** who support heritage tourism and seek to lift its profile.

1. Formal endorsement and release of Heritage Tourism White Paper	
<p>A Heritage Tourism White Paper to be prepared for consideration by the Australian Government. Once the White Paper is endorsed, work with Australian Government to share the paper with heritage and tourism industries. A communications plan will be needed to assist with both the release of the Directions Paper and its promotion.</p>	<p>ACTIONS</p> <ul style="list-style-type: none"> • Development of Heritage Tourism White Paper for the Minister of the Environment and Energy. • White Paper formally presented to the Australian Heritage Council by the National Trust. • Communications Plan prepared and press release agreed.
2. Create a National Working Group on Heritage Tourism	
<p>A National Heritage Tourism Working Group (WG) needs to be established to help set a clear national direction and to facilitate an agreed policy agenda. Meeting bi-annually, the working group could include representation from:</p> <ul style="list-style-type: none"> • National Trusts of Australia • ICOMOS • Indigenous Business Australia • Australian Tourism Industry Association (collaboration of State Tourism Industry Councils) • State Tourism Organisations • Australian Regional Tourism Network • Ecotourism Australia • Tourism Australia • Parks Australia • Local Government Association • Chairs and Officials of Australian, State and Territory Heritage Councils/ Departments • NB: Working Group mapping would be needed for the Community and Private Sectors 	<p>ACTIONS</p> <ul style="list-style-type: none"> • Appointment of an interim Chair to lead the formation of the Working Group. This would then move to a elected representative. • First meeting would establish administrative protocols and reporting. • Create an online portal for information and resource sharing.

STRATEGIC DIRECTION 1

Create a Strong Voice through National Alliances

3. Prepare a National Policy Agenda for Heritage Tourism	
<p>Through the Heritage Tourism Working Group agreement would be reached on the priority actions that should underpin a national heritage tourism policy plan. This plan would include:</p> <ul style="list-style-type: none"> • Defining the potential of the sector for growth and the role heritage tourism plays in supporting regional economic and social development and environmental stewardship, particularly in regional Australia. • The support needed for heritage conservation management. • New partnership models with the tourism sector to drive engagement. • The actions needed to support the development of a business model to finance and resource 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. • Alignment to the Australian Heritage Strategy and the National Tourism Strategy. 	<p>ACTIONS</p> <ul style="list-style-type: none"> • Seek feedback from working group stakeholders to determine priority areas that need to be included in the policy agenda. • Collaboration with new partners including Tourism Australia.
4. Establish a National Heritage Tourism Conference	
<p>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 is needed to stimulate discussion between leading players to both support common interests and maintain a common voice for the sector.</p>	<p>ACTIONS</p> <ul style="list-style-type: none"> • Through the working group establish an appropriate event where heritage tourism can be heard and define a partner model/program including seed funding, underwriting. • This event would be most effective as an extension of an existing event, such as the Ecotourism conference.

STRATEGIC DIRECTION 2

Demonstrate the significance of Heritage Tourism

There is currently little guidance or direction at either a national or state level on the economic, environmental and social significance of heritage tourism. The research gap (lack of data) on the economic, environmental 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 that a dedicated research program be established.

Aim: *To create a national research program to demonstrate the economic value of Heritage Tourism and to signify its contribution to Australia's social capital.*

1. Create a National Research Program	
<p>To quantify and demonstrate the economic, social and environmental value of heritage tourism, the heritage sector needs to take a leadership role by partnering with Tourism Research Australia, the Tertiary Sector and Tourism industry to develop a national research program. These partnerships can be used to 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 number and mix of visitors, the type of activity undertaken, visitor satisfaction and level of spend of heritage visitors, tracked over defined timeframes.</p>	<p>ACTIONS</p> <ul style="list-style-type: none"> • Create a subcommittee of the Heritage Tourism Working Group. • Ensure that any research program established is consistent with and can speak to the existing data sets that are used by Tourism Australia and the State Tourism Commissions to track visitation and consumer sentiment. • Seek the secondment of a research project manager from Tourism Research Australia to help drive this project. • Seek Tourism Research Australia's support for the establishment of a dedicated heritage tourism research project which can be aligned to their existing work plan.
2. Establish a National Heritage Tourism Barometer	
<p>It is recommended that a dedicated survey instrument be established to allow the collection and collation online of visitor and operational data from heritage places across Australia.</p> <p>In the first instance this should start with all nationally listed properties and include the National Trusts places. In time all heritage places can be included.</p> <p>The heritage survey can be modelled off a variety of industry surveys which are used for different sectors across the world</p> <p>The barometer would provide insights and a tracking mechanism for operational performance each year. It would allow the places to monitor visitor profiles and spend, travel patterns in the region, and track consumer sentiment and satisfaction.</p>	<p>ACTIONS</p> <ul style="list-style-type: none"> • Work with TRA to establish a collaborative model by the National Trusts and the AHC to seek agreement on the creation of a barometer and ensure support of the tool at heritage places. • Establish a methodology and cost for an online barometer.

STRATEGIC DIRECTION 2

Demonstrate the significance of Heritage Tourism

3. Create an Annual Impact Snapshot

Utilising the results of the dedicated research program and barometer, an annual economic and social impact statement would be prepared outlining:

- 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.

ACTIONS

- Align to existing Tourism Australia and Tourism Research Australia data sets.
- Report the 'Health of the Nation' for heritage tourism in line with the fiscal year, giving consideration to the budget cycles.
- Alignment to the Tourism Australia annual reporting.

STRATEGIC DIRECTION 3

Develop the skills and capabilities of heritage tourism operators

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 future cornerstone of the heritage experience. The heritage sector can 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.

Heritage Tourism operators need training and learning resources to support the development of new heritage based experiences.

Aim: *Position the heritage sector as having both an expertise in storytelling and the ability to identify and explain a destination's unique selling points.*

1. Training and implementation of storytelling and experience development

Tourism across the globe is becoming more about journeys and experiences than simply viewing or visiting places and destinations. 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.

Volunteers are invaluable in the servicing of the heritage sector and are crucial in telling the story of the places to deepen the visitor experience.

An experience development toolkit has been created by the National Trusts and EarthCheck and trialled in six pilot locations.

The toolkit can be used to both train heritage tourism operators across Australia in story telling and experience development and taken forward in a train the trainer program so that it has national coverage

ACTIONS

- Package the existing experience development toolkit created for the National Trust into a national pilot training program.
- Create an online training portal to provide access to all participants of education, tools and messaging outlines.
- Develop a mentoring program that directly connects volunteers, storytellers and properties with mentors skilled in the development and delivery of environment, heritage and indigenous stories.

STRATEGIC DIRECTION 3

Develop the skills and capabilities of heritage tourism operators

2. Mapping of Heritage Tourism Storylines	
<p>Storytelling is not only the foundation of a visitor experience, but is integral to the identity and sense of place experienced by the host community. Importantly, it provides an opportunity to form strong connections across state boundaries, and with traditional owners, in a similar way to the role played by indigenous song lines which can cover multiple geographic areas.</p> <p>A unified storytelling program will help to ensure consistency to promote and elevate the significant stories of the nation right down to how they are delivered at a destination and local level.</p>	<p>ACTIONS</p> <ul style="list-style-type: none">• Undertake a mapping program to document national stories and how these can be aligned to heritage tourism places and align to the updated Australian Heritage Strategy. Consider how ancient and modern storytelling can be aligned.• Create an online network of storytellers, both private and public sector to form a community to embed storytelling practice using blogs, video and existing social media platforms.• Work with State and Local Government to connect, conserve and support heritage tourism places.• Link with updated Australian Heritage Tourism Strategy.
3. Review and audit of regional and state destination management plans (DMPs)	
<p>The key for the heritage sector to gain high level marketing exposure is to learn to how link heritage stories with the destination management plans and destination branding which has already been developed across Australia by the tourism industry. Currently, destination branding is often linked to natural features or climate. By creating linkages between the stories of a location and its destination brand, heritage can help to create unique experiences demanded by visitors.</p>	<p>ACTIONS</p> <ul style="list-style-type: none">• Connect with tourism authorities in the States and Territories to communicate the Heritage Tourism Framework.• Assess the DMP's to seek opportunities and gaps and embed how heritage tourism can contribute to the building of better regions. This would be done through survey, workshops and interviews of relevant agencies.• Select 5 Destination Management Plans for audit, utilising the experience development framework, the national story lines and the results from the barometer.

STRATEGIC DIRECTION 3

Develop the skills and capabilities of heritage tourism operators

4. Create and promote a national ambassador program for heritage tourism

Ambassador programs are a powerful way to engage with the local community and visitor markets. Ambassadors can be used to not only promote the economic and social value of heritage places but they assist in highlighting the significance of heritage to governments at all levels.

ACTIONS

- Design an ambassadorial program that can work towards advocacy, promotion and storytelling around the pillars and themes of the national strategy.
- Nominate 6 ambassadors from diverse fields, including popular culture and arts to help drive the message in to the mainstream.
- Design a simple campaign around social media that aligns and can articulate to media and the general public on the necessity for heritage tourism and the battle cry that “we are ‘open for business’”.

5. Develop and promote quality visitor services

It is important to promote a commitment to industry quality service standards by encouraging participation in industry accreditation programs and schemes and providing training to volunteers and front line staff.

ACTIONS

- Work with State and Territory Tourism Commissions to access and encourage participation in existing training and accreditation programs.
- Promote access to business to business networking including workforce planning information and grant funding opportunities.
- Seek support from the tourism industry to access information on the needs of new visitor markets including the Asian markets who have a high growth expectation.

STRATEGIC DIRECTION 3

Build the skills and capabilities of heritage tourism operators

6. Develop Digital Marketing content and partnerships

Up and coming visitor markets, particularly Millennial age groups, both prefer and depend on digital channels to seek information and inform decision making. Establishing a cohesive digital marketing strategy which appeals to a range of audiences is integral to visitor attraction and promoting the core aims of heritage conservation and advocacy.

ACTIONS

- Engage with State tourism organisations to seek guidance on appropriate digital marketing techniques, including alignment with existing State digital campaigns.
- Provide best practice case studies for large and small heritage attractions and showcase digital champions who can explain:
 - Online advertising.
 - Search engine marketing and optimisation.
 - Social networking and user generated content (blogging).
 - Geo search maps and apps.
 - Email campaigns and website promotions etc.

STRATEGIC DIRECTION 4

Develop a National Heritage Tourism Strategy

Develop a three Year National Heritage Tourism strategy that aligns the efforts of the various partners into a definitive plan of action. Capitalise on changing market needs to position heritage tourism for sustainable growth.

Aim: To develop a National Heritage Tourism Strategy

1. Develop a National Heritage Tourism Strategy

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

ACTIONS

- Establish the Terms of Reference for a National Heritage Tourism Strategy.
- Develop a partnership with Tourism Australia and the State and Territory Tourism Commissions to guide the development of the strategy.
- Align the strategy with the future Tourism Australia 2030 plan and the new plan which will be developed by the AHA.

Action Summary

Action	Timeframe
Formal release of White Paper	November 2018
Create a National Working Group on Heritage Tourism	November 2018
Prepare a National Policy Agenda for Heritage Tourism	Ongoing
Establish a National Heritage Tourism Conference	November 2018 - ongoing
Create a National Research Program	March 2019 - ongoing
Establish a National Heritage Tourism Barometer	2019- ongoing
Create an Annual Impact Snapshot	December 2019 (annually)
Training and implementation of storytelling for the delivery of a 'national heritage tourism curriculum'	March 2019
Mapping of Heritage Tourism Storylines	June 2019
Review and audit of regional and state destination management plans (DMP), through a National Partnership Program initiative	June 2019
Create and promote an national ambassador program for heritage tourism	June 2019
Develop and promote quality visitor services	June 2019
Develop Digital Marketing content and partnerships	June 2019
Develop a National Heritage Tourism Strategy	December 2019

Potential Key Performance Indicators

KPI	Actions and Outcomes
A stronger national voice	<ul style="list-style-type: none"> National Heritage Tourism Working Group Established Priority established for 2030 outlook together with key policy initiatives National Heritage Tourism Conference established
Economic and social significance	<ul style="list-style-type: none"> National research program developed Barometer established to track economic and social performance Annual economic and social impact statement established Visitor markets tracked including spend, travel patterns, satisfaction and length of stay New market growth tracked
Experience development and story telling	<ul style="list-style-type: none"> Heritage experience development framework and toolkit delivered across Australia Online training portal established Mentoring program established Mapping of National story lines completed. Heritage tourism taken up in destination management plans across Australia National ambassador program created
National Heritage Tourism Strategy prepared	<ul style="list-style-type: none"> National Heritage Tourism Strategy prepared and alignment achieved with National Tourism Strategy 2030 and the Australian Heritage Strategy

5 Mapping our way forward



Rathdowney Heritage Festival, courtesy of Barry Alsop Eyes Wide Open Images via Tourism and Events Queensland

Next Steps

STRATEGIC FRAMEWORK	2018	2019	2020
CREATE A STRONG VOICE Establish Strategic Coordination and National Leadership	<ul style="list-style-type: none"> Burra Heritage Tourism Summit Undertake initial meetings with State and Territory tourism agencies and Commonwealth Departments including Tourism Australia Develop Directions Paper Establish a National Heritage Working Group Federal Government endorsement of Directions Paper 	<ul style="list-style-type: none"> Heritage tourism opportunities recognised by States and Territories Documentation of national, state and Local Government grant programs Develop a national policy agenda 	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Establish T.O.R for a national economic and social research program with TRA Identify common tracking mechanism for visitation and spend at heritage places 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> Database established of regional heritage attractions and visitor flows All attractions have tracking mechanisms in place for type and visitor spend and visitor satisfaction
BUILDING THE SKILLS AND CAPABILITIES OF HERITAGE TOURISM OPERATORS Operators	<ul style="list-style-type: none"> Create an operators experience toolkit Undertake six national experience development pilot programs across Australia Experience Development Plan prepared for heritage tourism operators 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Develop T.O.R for National Heritage Tourism Strategy Map heritage themes in existing tourism destination management plans Align Strategy with Tourism 2030 plans 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> National Heritage Tourism Strategy in place Destination plans start to incorporate dedicated themes on heritage tourism

6 Appendices



Paddington Reservoir Gardens, Sydney, courtesy of Destination New South Wales

Appendix 1

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 places.

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.

Appendix 1

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.

Appendix 1

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 through 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, places 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.



Sharam Cottage, courtesy of South Australian Tourism Commission