

Arts Tourism

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2 October 2007

What is Arts Tourism?

Arts Tourism

- Consists of two elements 'arts' and 'tourism'
- Consumption of arts by tourists
- Further examination in context of Cultural Tourism



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Presentation Overview

- Cultural Tourism
- Cultural Tourism & the Arts in Wales
- Examples of Best Practice
- Conclusion

Cultural Tourism

Cultural tourism can briefly be defined as tourism based on local and regional cultural resources.

These include cultural traditions, language, history, cultural landscapes, built environment, archaeological sites, museums and cultural activities such as **festivals, galleries, arts attractions, theatres** but also attractions related to primary production, crafts, manufacturing, social history and life.

Cultural tourism is related to human activities and history in a broad sense.

Value & volume of Cultural Tourism 1

- EU is the leading world destination in terms of international tourism flows - 444 million international arrivals in 2005
- 717 million international arrivals by 2020 (source: UN WTO 2005)
- World Tourism Organisation has estimated that 37% of all trips have a cultural element

Value & volume of Cultural Tourism 2

- Cultural tourism one of 5 key market segments of the future
- 15% market growth for cultural tourism in Europe
- 30% of tourist destinations chosen by virtue of presence of heritage sites
- 50% if wider cultural sector is included (source European Commission 2003)

Employment value in EU

- 10m people are employed in tourism
- 7m people are employed in cultural industries
- Cultural tourism is rooted in destination, therefore not easily relocated
- Cultural tourism directly contributes to maintenance of museums, heritage sites and cultural venues

Cultural Tourism Data

- Practitioners and policy makers need reliable metrics
- Limited comparable data on cultural tourism
- Sectors collect and use data for differing purposes
- ATLAS Cultural Tourism Research Project established to provide comparative trans-national data on cultural tourism data.
- Wales Tourist Board Focus Group Research





Who are the cultural tourists?

- General tourists who participate in cultural activities as part of a general holiday
- Cultural tourists whose main motivation for travel is culture

Characteristics of cultural tourists

- Bias towards higher income socio-economic groups
- Higher spenders
- Link between employment in the cultural industries (Richards, 2007)
- 55+ age group, although youth market also important
- Some activities more popular with women than men (& visa versa)
- Use of internet

Socio-economic & demographic trends support market growth

- Ageing population
- Increasing affluence with populations becoming more middle class
- Time pressures/ time poor, increased stress
- Increasing consumer sophistication
- Increasing use of the internet.
- Increasing proportion of the population benefiting from a university education.

ATLAS findings on cultural tourists

- Not all visitors to cultural events and attractions are motivated by culture.
- ATLAS surveys have consistently found more visitors to cultural sites are on a city break (25%) or touring holiday (28%).
- In ATLAS surveys an increasingly higher proportion of visitors have indicated that they take a cultural holiday

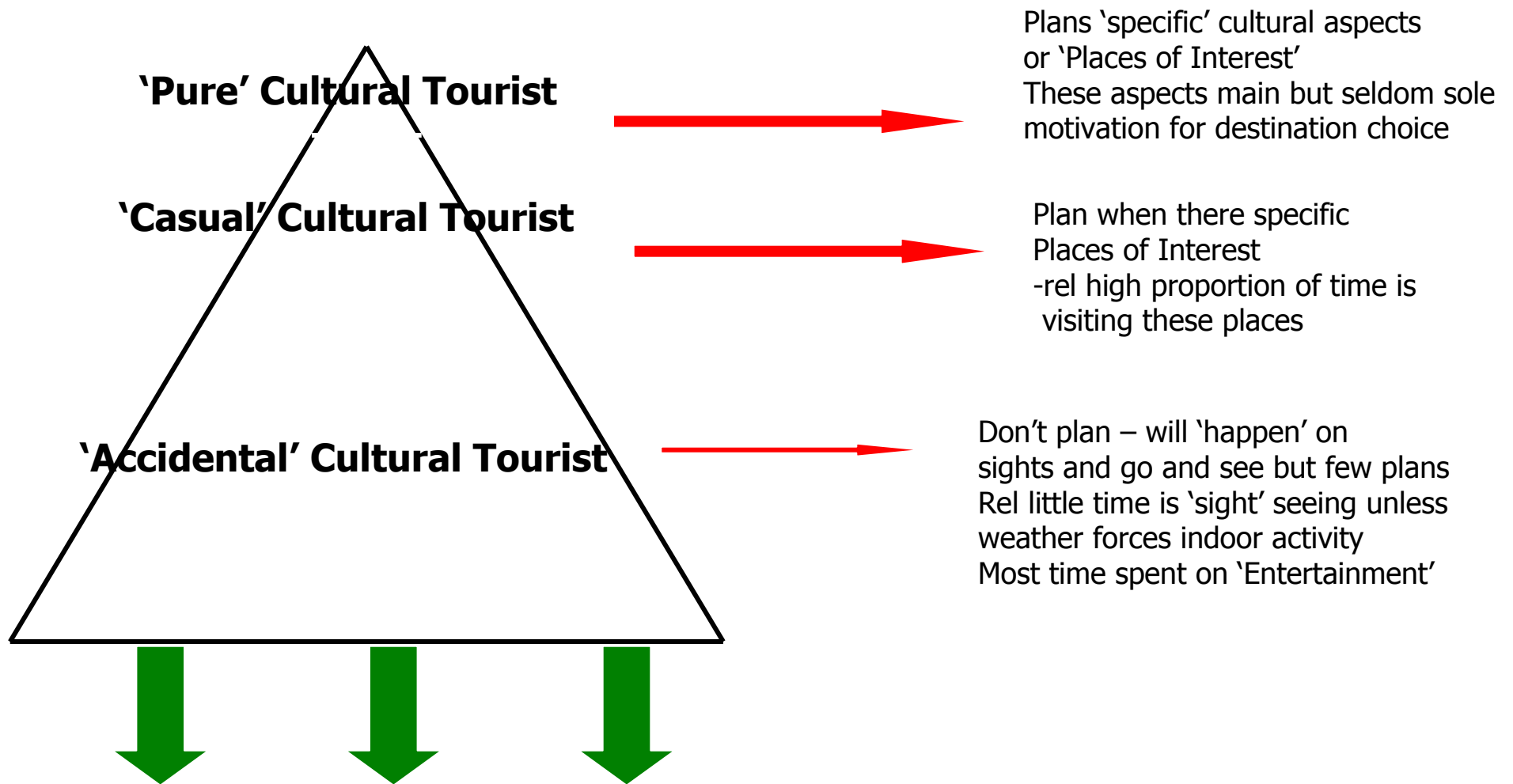
Year	Proportion of visitors taking a cultural holiday
1997	17.5%
2001	25%
2004	27%



WTB focus group research findings

- Commissioned in order to more fully understand:
 - The nature of Cultural Tourists
 - Cultural Tourists Behaviour and Expectations
- Important finding only a restricted minority see themselves as 'Cultural Tourists'
- Although 'places of interest' were an intrinsic part of holiday or break
- Term 'culture' perceived as a distinct concept
- Similar findings in WTO report on City Tourism and Culture (2005)

Classification of cultural tourists



What do cultural tourists want?

- Accommodation & food – critical to choice in destination
- Quality & availability of choice
- Specific places of interest (often assumed)
- Easy access
- Convenience & flexibility
- Choice of 'local' shops



What motivates cultural tourists?

- Experience atmosphere
- Finding out about local culture
- Sightseeing
- Mix of culture, entertainment and relaxation
- Levels of cultural motivation varies

Cultural Tourism Trends

- Recent shift from heritage attractions towards arts attractions
- EU Market Trends -Tourist arrivals will double over the next 25 years
- Increasing competition between traditional and emerging European destinations
- Growth of City tourism
- Use of major cultural events for strategic positioning of cities as cultural tourism destinations
- Diversification within cultural tourism market

Cultural Tourism & the Arts in Wales

Cultural Tourism Strategy for Wales

4 Thematic programmes

- Improving visitor accessibility to Welsh culture
- Improving the quality of the visitor experience
- Raising the profile of Wales as a cultural tourism destination
- Understanding the characteristics and needs of the cultural tourist

Cultural Tourism and the Arts

- Performing Arts
- Arts Festivals & Events
- Visual Arts
- Art collections
- Supporting marketing activities and destination image

Performing Arts

- Activities include drama, dance, mime, music and opera
- Performing arts venues relevant to all these activities
- Arts festivals may include elements of performing Arts

Performing Arts - Wales

- ACW study identified 295 venues in Wales
- Visitor spend in Cardiff theatres £1.2 million 2003-4
- Wales Millennium Centre new world class venue, £2.7 million additional visitor spend in 2005



ballet, opera, dance.
all under one roof-type thing

London has a Gherkin, Paris has a Pyramid. A capital city isn't a capital city without a mad looking building at its core. The Wales Millennium Centre is made from 100% pure Wales. 5,000 tonnes of local disused slate make up the fascia alone. Wander in. You may catch a free public performance. It's being called the most important cultural initiative of the 21st Century. Although some locals just call it The Armadillo.



www.wmc.org.uk

www.visitwales.co.uk
0800 328 7000

THE WOODEN STONES
FOR HORIZONS
WYNNIS AWENSING



WALES CYMRU
THE BIG COUNTRY

Welsh National Opera

- 60th anniversary 2006
- Largest UK touring opera provider
- Catchment area -12 million people
- Permanent company – 250 people
- WMC is administrative & rehearsal base
- Annually tours over 120 main scale opera performances

Arts Festivals & Events

- 1.2-1.5 million people attend arts festivals in Wales
- Music events featured by 85% of festivals
- 60% rely on voluntary staff
- 30 identified as national or international in status or influence

Classification of events

- Mega Events.
- Key Events
- Hallmark Events
- Regional/Local Events



National events

- Hay Literature Festival
- Urdd Eisteddfod
- Llangollen International
Music Eisteddfod
- National Eisteddfod



National Eisteddfod

- Hallmark event
- Poetic & Musical competition
- Unique to Wales
- Peripatetic annual event
- Showcase for Welsh language & culture



Llanwrtyd Wells - The 'Town Of Festivals'

- Programme of annual events.
- 'Saturnalia' Roman Festival in January
- 'Real Ale Ramble' in November
- Most famous for headline-grabbing 'International Bog Snorkelling' championships and 'Man versus Horse' marathon.

Visual Arts in Wales

- Oriel Mostyn Gallery in Llandudno
- Development of Graham Sutherland Gallery, St Davids
- Artes Mundi
- A National Museum of Modern Art.

Galleries & Artistic and Heritage Exhibits/Museums in Wales

- Collectively 2.7 million visits per annum
- 48% to 8 sites of National Museums Wales
- 35 museums run by local authorities, a further 12 run by independent trusts and 5 by private operators
- 250 organisations in Wales classified themselves as galleries

Specific recreation pursued as main purpose or not in Wales

	1997-1999	2000-2002	2001-2003	2002-2004
Visiting a "heritage" site trips	1,427,333	3,446,000	3,245,500	3,037,000
Expenditure (£m)	259.5	575.9	553.9	570.9
Watching performing arts trips	227,000	619,667	484,000	520,500
Expenditure (£m)	31.6	123.5	96.4	114.5
Visiting artistic or heritage exhibits trips	509,333	2,069,667	2,005,500	1,879,500
Expenditure (£m)	99.7	358.6	362.7	373.0

N.B. These figures are the annual average over the three-year period

Source UKTS

Specific recreation as MAIN PURPOSE of holiday trip in Wales

	1997-1999	2000-2002	2001-2003	2002-2004
Visiting a "heritage" site trips	135,667	193,333	206,000	167,000
Expenditure (£m)	26.8	29.1	35.7	25.7
Watching performing arts trips	55,700	85,333	86,667	92,000
Expenditure (£m)	6.6	7.9	9.2	10.5
Visiting artistic or heritage exhibits trips	40,000	66,667	54,333	50,667
Expenditure (£m)	9.7	8.7	9.2	7.4

N.B. These figures are the annual average over the three-year period

Source UKTS

Examples of Best Practice

- Partnership working
- Networking
- Developing a sense of place
- Using the arts to support destination brand image

Cultural Tourism Partnership

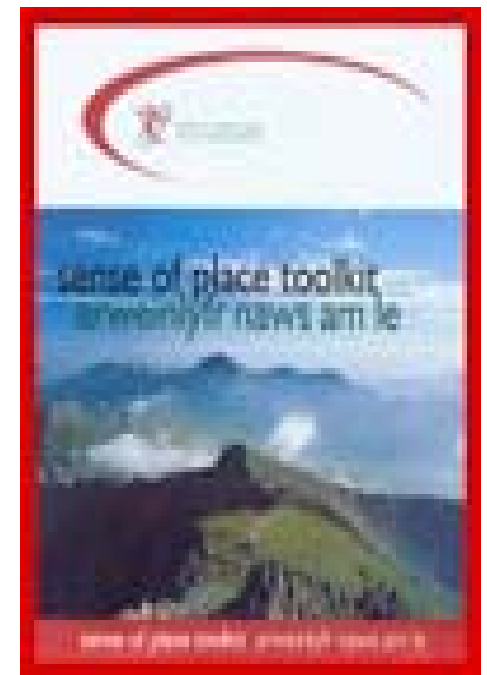
Arts sub group

Include:

- Arts Council for Wales
- Welsh Language Board
- BBC National Orchestra for Wales
- National Museums Wales
- Trac
- National Library for Wales
- Churches Tourism Network Wales
- Llangollen International Music Eisteddfod
- Audiences Wales
- Welsh Music Foundation

Sense of Place

- Defining own sense of place
- Raise awareness that using Welsh gives a competitive edge
- Identify good practice and share it
- To support the use of welsh language, produce and products
- Working with others for mutual benefit



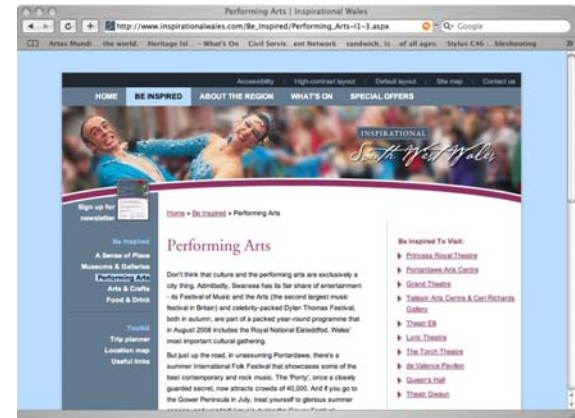


European Cultural Tourism Network

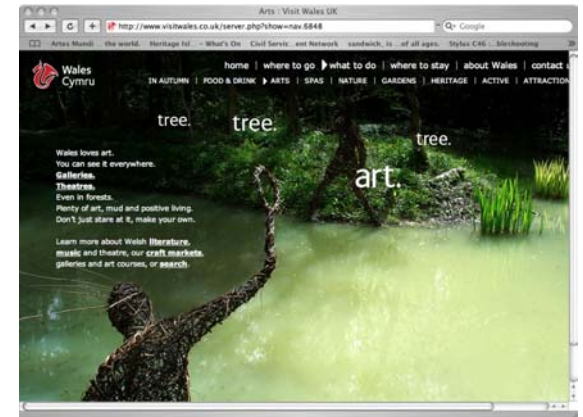
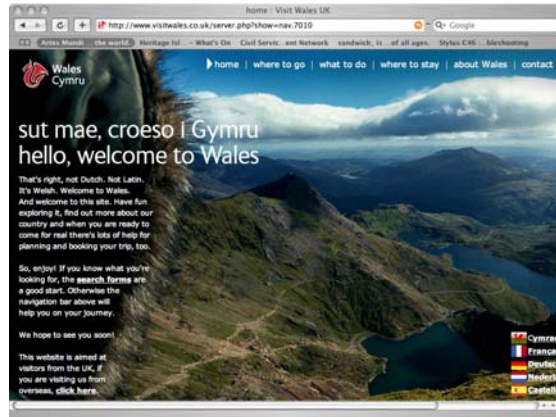
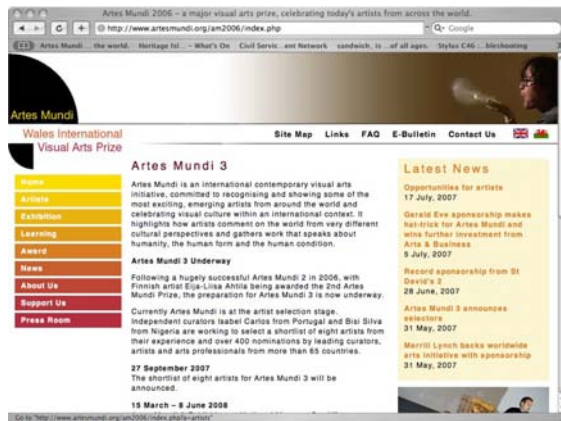
<http://www.cultural-tourism.net>

Wales Brand

- Spirit of the Place
- Spirit of the People
- Spirit of the Culture & History



Arts & Wales Brand Image



Arts Tourism - Conclusion

- Arts & culture not always main motivator
- Socio economic trends support market growth
- Challenges measuring
- Cultural tourism & arts part of product mix
- Tourists also want quality & availability of choice
- Partnership working is important
- Arts can be used to support destination image

Diolch yn fawr!
Thank you
Any Questions?

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