

# **Heritage, Tourism and Integrity – Making it Work<sup>1</sup>**

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## **Introduction**

This paper examines some of the issues that arise when heritage and tourism intersect, and briefly discusses two recent Australian projects which take different approaches but which both offer guidelines for achieving the economic benefits of tourism while respecting the principles of heritage conservation and management..

## **Heritage, tourism and the marketplace**

‘Heritage’ as a term referring to places and objects in the public domain is a relatively recent arrival, emerging in Europe and Australia in the 1970s.<sup>2</sup> It is now used to refer to places, to objects or artefacts and indeed to ‘all accumulated cultural and artistic productivity, frequently whether produced in the past or currently’<sup>3</sup>. It has also come to include aspects of the natural environment which are survivals from the past or seen as in some way typical or original. It incorporates archaeological sites and objects that make their way from these sites into museums or other collections.

Throughout the 1980s heritage was used increasingly for commercial purposes. Places with natural or cultural heritage associations were increasingly promoted as attractions for visitors. Interpreting places and ‘themes’ moved from a fairly straightforward process of conveying information through signs and brochures to elaborate interpretative centres and costumed re-enactments. ‘Heritage’ arts and crafts have entered the market place as souvenirs to visitors who want to take home something that has special associations with a particular region or culture.

Heritage tourism in Europe is now a major industry; it is a significant part of the global tourism demand and of the advertised tourism product around the world. Collecting cultural and heritage experiences “has become part of the wider consumer culture”.<sup>4</sup>

By the early 1990s, English author Richard Prentice could write in a matter of fact way that “For both the public and the private sectors a nation’s or community’s heritage is no longer of intrinsic worth only, it has become a resource from which employment and capital accumulation may flow.”<sup>5</sup> This statement neatly

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<sup>2</sup> Davison, G. 1991; Richards, G. 2000.

<sup>3</sup> Tunbridge, J. E. and Ashworth, G.J. 1996:2

<sup>4</sup> Richards, G. 2000:15

<sup>5</sup> Prentice, R. 1993:21, 222

encapsulates one of the central tensions of heritage tourism – conservation of intrinsic worth (or heritage value) or exploitable economic resource?

The commercialisation of heritage has been accompanied by lively discussions of issues such as the separation of history from heritage, the effect of commercial exploitation on heritage resources, whether the past can ever be accurately presented, what constitutes a ‘cultural resource’, loss of cultural identity and the pressures on some cultural groups to resist change so that attractive ‘heritage’ customs can be maintained.<sup>6</sup> With the growth in consumption of heritage and culture as tourism product, there has also come growing concern about the impacts of tourism on the environments, sites and cultures it consumes. Calls for ‘sustainable tourism’, ‘responsible tourism’ and ‘ethical tourism’ have become a familiar part of the background noise of both heritage and tourism forums around the world.

Australian use of the term ‘heritage’ has followed a similar path to that taken in Europe and the United States. While cultural heritage and tourism have had a less obvious relationship here than they have in Europe, travellers in Australia have been interested in exploring places with historical associations or areas of natural beauty since the middle of the nineteenth century. Heritage began to enter the marketplace here in a significant way the 1970s as awareness of heritage grew and Australian tourism was beginning to take shape as a major leisure and economic activity at the same time<sup>7</sup>.

As the links between heritage, sense of place and identity have become more widely recognised over the last ten years, there has been increasing interest in producing and presenting heritage as tourism product to both the domestic and international marketplaces in Australia. These ‘products’ include museums, historic buildings and places, theme parks, national parks, gardens, Indigenous cultural sites, archaeological sites and heritage trails. They form a central part of the image and perceptions of their towns, cities or regions as tourism destinations can appear in regional brand names such as the ‘Shipwreck Coast’ (Victoria) and the ‘Copper Triangle’ (South Australia).

### **Cultural tourism or heritage tourism**

Heritage, culture and tourism are all complex concepts that are defined in many ways. The definitions offered here cover most of the key concepts involved in the terms that combine them as ‘cultural tourism’ and ‘heritage tourism’ as they are currently used in Australia.

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<sup>6</sup> See for example, Lowenthal, D. 1985,1998; Tunbridge J.E. and Ashworth, G.J. 1996; Richards, G. 2000; Davison G. 2000; Nicholas G.P. and Andrews T.D. 1997.

<sup>7</sup> Davison, G. 1991; Richardson, J.I. 1999.

*Cultural tourism* has been on the active agenda in Australia for at least a decade, yet there is still uncertainty about what it actually means.<sup>8</sup> If we use the sort of definition offered in *Creative Nation*<sup>9</sup>, we can see that it aligns fairly closely with what many people seek from travel: Cultural tourism embraces ‘the full range of experiences visitors can undertake to learn what makes a destination distinctive – its lifestyle, its heritage, its arts, its people – and the business of providing and interpreting that culture to visitors’<sup>10</sup>. This emphasis on *experience* is an important one<sup>11</sup>, and has been influential in thinking about culture and tourism since the mid 1970s, when MacCannell wrote that “All tourists desire this deeper involvement with society and culture to some degree; it is a basic component of their motivation to travel.”<sup>12</sup>

In Australia, heritage tourism is usually regarded as a subset of cultural tourism. In some cases it is given a particular emphasis on recognised heritage places. The Australian Heritage Commission, for instance, views heritage tourism as involving “activities and services which provide domestic and international visitors with the opportunity to experience, understand and enjoy the special values of Australia’s natural, indigenous and historic heritage.”<sup>13</sup>

Heritage tourism has also been described as “an encounter with or an experience of being part of the history of a place” through visiting historic places, buildings and landscapes. It often has an emphasis on learning and includes “the experience of local traditions, social customs, religious practices and cultural celebrations”.<sup>14</sup>

Greg Richards’ recent review of European cultural and heritage tourism<sup>15</sup> suggested that heritage tourism “is largely concerned with the cultural legacy of the past, or the “hard” cultural resources usually contained in old buildings, museums, monuments and landscapes or represented and interpreted in specialized ‘heritage centres’.” He also noted that heritage can cover many aspects of living culture, as well as the cultural and natural past. In traditional cultures the heritage of the past may also be a living element of contemporary society. The dynamic and diverse cultures of Australia’s Indigenous peoples are a good example of this.

### **Current issues and trends**

Whatever the intricacies of defining heritage tourism, there is no doubt that it entails putting valued aspects of history, culture and natural environment into the

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<sup>8</sup> See, for instance, the discussion in Foo and Rossetto 1999.

<sup>9</sup> Commonwealth of Australia. 1994.

<sup>10</sup> *Creative Nation*

<sup>11</sup> Zeppel and Hall 1991:31; Crinion, D and Leader-Elliott, L 1991; Blamey, R.K 1995.

<sup>12</sup> MacCannell, D. 1976:10

<sup>13</sup> Australian Heritage Commission 1999

<sup>14</sup> Zeppel and Hall 1992

<sup>15</sup> Richards, G. 2000:9-10

marketplace as 'experiences' for consumption. The heritage of a place contributes to its appeal as a tourist destination and can lead to the development of a whole range of spin-off products such as heritage trails, guided tours, theme parks, recreated villages, themed events and so on.

Cultural heritage not be the only, or even the main reason for travel, but it is often an important secondary reason for selecting one destination over another and in extending length of stay.

Most people visit heritage attractions as part of a wider itinerary and general recreation or sightseeing activities. Only a minority of visitors to heritage attractions have a specific interest in the attraction or its subject matter, or a special interest in heritage or culture.<sup>16</sup> A Bureau of Tourism Research survey has shown that those international visitors to Australia who have the time or connections to learn what is available here culturally are the most likely to form a specific interest in attending a particular event or site.<sup>17</sup> That is, those most likely to be interested in visiting specific cultural or heritage attractions are those who are here for a longer time and have the opportunity to learn about what is available from others – either friends and relatives or other travellers with whom they exchange news.

In his recent review of trends in European heritage tourism, Richards notes that the numbers of visitors to cultural attractions who have a general interest in culture are growing more rapidly than those of visitors with a specific cultural motive. As this trend continues, he anticipates that the cultural market will extend towards mass tourism "through the opening of new popularized cultural and heritage attractions".<sup>18</sup> Richards notes that the nostalgia-driven heritage tourism boom of the 1980s "has been replaced by a more pragmatic vision of the need to utilize the legacy of the past to stimulate contemporary production as well as consumption".<sup>19</sup>

There has been insufficient research in Australia for us to say with any confidence why different groups of tourists visit different heritage attractions. Statements that visitors to heritage places are motivated by nostalgia for a rosier past, pursuit of ethnic identity or a desire "in Australia to replace the curse of recency and to forge indigenous pride"<sup>20</sup> are all very well in the abstract, but they don't help us to understand why people visit particular heritage places or museums, what images they have of them and how these motives and images vary between different types of attractions and different parts of the country.

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<sup>16</sup> Leader-Elliott, L. 1996:12; Laws, E. 1998; Prentice, R. 1993; Foo, L.M. and Rossetto, A. 1998, Weiler, B and Hall, CM 1992.

<sup>17</sup> Foo, L.M. and Rossetto, A. 1998:3

<sup>18</sup> Prentice 1993:75,79. Richards, G. 2000:14

<sup>19</sup> Richards, 2000:14

<sup>20</sup> See for instance Lowenthal, D. 1998:6. Lowenthal apparently intends 'indigenous' to mean 'Australian national'; Richards, G. 2000:11; Davison, G. 1991: 4-5;

In Europe, cultural visitors are identified as well-educated, skilled consumers “for whom the pursuit of culture is a form of personal development”.<sup>21</sup> International visitors to cultural attractions in Australia are mostly seeking an opportunity to experience something Australian, new or educational during their stay.<sup>22</sup>

At national level and in some States, heritage is being discussed as an opportunity for the development of tourism in regional Australia. There is increasing interest in heritage trails and interpretation projects. For instance, the Australian Heritage Commission is very keen to develop heritage regional tourism plans.<sup>23</sup> Queensland is developing a Heritage Trails Network in partnership with the Commonwealth and local government, communities and businesses. This very ambitious project is developing several long distance trails based on heritage themes and designed to draw visitors into the more rural and remote parts of the State that are off the main existing tourist routes. The trails will link historic sites, museums, cultural centres and natural heritage places.<sup>24</sup>

The Northern Territory *Strategy for the Tourism Drive Market* recommends that selected road networks should be designated as tourist drives “with internationally appealing themes and logos.” Their aim is to “help bring the open spaces to life through vivid and imaginative interpretation of the significance of the landscapes, the roles played in human endeavours to survive and progress and the inter-relationship of the elements that make up the Outback”<sup>25</sup>. The Explorer Highway, following the route of the Stuart Highway is the first to be developed. Another following the route of the old Ghan Railway is nearing completion. Both of these interpretive projects have been planned cooperatively between the Northern Territory and South Australia. South Australia is also planning a network of coastal trails that will combine natural, historical and Indigenous heritage interpretation and will include maritime as well as land-based heritage. South Australia Already has eight underwater heritage trails, the most recent of which is the ‘Southern Ocean Shipwrecks Trail’).

Western Australia is moving ahead with the multi-million dollar Golden Pipeline project to interpret the Mundaring-Kalgoorlie pipeline that supplied water to the Western Australian goldfields. Victoria has themed trails through the Central Goldfields regions and following the routes taken by explorers such as Mitchell. The Office of National Tourism has funded overseas study trips to identify the critical success factors for trails and tourist drives.

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<sup>21</sup> Richards, G. 2000:11

<sup>22</sup> Foo, L.M. and Rossetto, A. 1998:2

<sup>23</sup> King, P. 2000?

<sup>24</sup> Ibid.

<sup>25</sup> Northern Territory Tourist Commission. 1996:4

While new projects such as these are attracting funds, allocation of resources to maintain and upgrade existing heritage places is seriously deficient. This situation is unlikely to improve as the Commonwealth government moves towards the New Heritage Regime announced earlier this year, and as the Commonwealth encourages states to pick up a higher percentage of funding responsibilities for heritage as a result<sup>26</sup>.

### **Critical success factors in heritage tourism**

Not all heritage places or activities have the potential to be tourist attractions – nor indeed should they be. To become a successful attraction requires taking steps beyond traditional heritage management into the worlds of marketing, business management and the tourism industry itself. It is necessary to deal with a wide range of issues to make heritage tourism work – cultural integrity, identity, site protection, conservation, visitor management, customer service, visitor experience, marketing, economic benefit and benefits to local communities must all be taken into account.

In recent years there has been a considerable amount of research concerning what makes a cultural attraction succeed as a business enterprise. A number of critical success factors have been identified. These factors tend to group into the following areas:<sup>27</sup>

- 1) Understanding of heritage significance.
- 2) Effective management of the cultural resource to ensure its key values and integrity are retained.
- 3) The will to enter the tourism market place.
- 4) Business planning and management skills.
- 5) The ability to develop and present distinctive product, to provide an engaging experience for visitors.
- 6) A focus on customer needs and interests.
- 7) A well conceived and targeted marketing program which generates local and wider market interest.
- 8) Community support and ownership.

Even this brief list of factors begins to indicate the complex management required to be successful in heritage tourism. Both heritage and tourism management require a specific focus of expertise. If heritage tourism is to succeed, it must find a way to draw on both sorts of expertise, balancing the needs of both sectors. There is

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<sup>26</sup> Information on the New Heritage Regime is on the Australian Heritage Commission website AT [www.environment.gov.au/heritage](http://www.environment.gov.au/heritage)

<sup>27</sup> Sources for this include Australian Heritage Commission 1999 and 2000; Department of Communication, Information Technology and the Arts 1999; Laws 1998; Leader-Elliott 1996; Prentice 1993; Silberberg 1995; Tourism New South Wales 1996; Walsh-Heron and Stevens 1990.

increasing recognition that culture, heritage and communities are the raw materials on which tourism depends – they are what give destinations a distinctive character. Successful heritage tourism must balance the needs of tourism businesses, heritage managers and the community.

### **Heritage and Tourism World Views**

Heritage organisations are typically concerned with issues of significance, integrity, conservation and sustainability. The primary concern for most cultural organisations is their cultural purpose. They do not see themselves as serving a tourist market principally or at all<sup>28</sup>. Many are wary of the potential impacts of tourism on cultural or site values and integrity. Yet they are also likely to view tourism as being a way of earning much needed money that can generate funds for conservation works and (sometimes) provide local employment.

Tourist operators, on the other hand, are primarily interested in ensuring that their customers have an interesting and enjoyable visitor experience. They are in business to make a profit. They need to be sure that their product suits the marketplace and that they can meet if not exceed their customers' expectations in all aspects of service delivery. Some parts of the tourism industry see that aspects of heritage can become assets to their business operations if they are included in tour packages or developed as tourist attractions. Other operators have no personal interest in heritage or culture and are baffled by suggestions that their customers might be. Many tourism operators view the heritage sector as lacking the business skills and customer focus needed to deliver consistent service and standards. They find particular difficulties in working with organisations run mainly by volunteers<sup>29</sup>.

Over the last three years, there have been several major Australian initiatives designed to bridge the gap between heritage integrity and conservation requirements on the one hand and the marketplace consumption of tourism on the other. This paper briefly considers some of the key issues and trends in Australian heritage tourism and reviews two new sets of guidelines for responsible heritage tourism, both of which represent collaborative efforts between the tourism and cultural sectors and the communities in which it takes place.

### **Australian Initiatives – bridging the gap**

Two major Australian projects have recently produced different tools designed to encourage the growth of heritage and cultural tourism in ways that bring economic benefit while retaining cultural values and heritage significance. They both involve cooperation between sectors – heritage, culture, tourism, business, government and community. Both have gone through lengthy consultation processes that have

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<sup>28</sup> Ashworth, G.J 2000:23

<sup>29</sup> Arts SA 1996; Dept of Communications, Information Technology and the Arts 1999.

strengthened the final documents by enabling them to incorporate the views of hundreds of interested individuals and organisations.

### ***1 Successful tourism at heritage places***

The Australian Heritage Commission, Tourism Council Australia and CRC for Sustainable Tourism have joined forces to develop these guidelines, published in draft in 1999 and due for publication in final form late in 2000 as *Successful tourism at heritage places*.

*Successful tourism at heritage places* is “designed for tourism operators, heritage managers, communities and others who need to understand the issues involved in tourism and heritage places. ...A core principle ... is the need to look after Australia’s heritage assets”.<sup>30</sup> Successful tourism at heritage places is identified as requiring “a commitment to *quality* and *responsibility*, which flows through into business profits and benefits for the heritage place and community where it is located”.

It sets out principles and guidelines for heritage tourism, and includes Australian case studies. The **principles** it identifies are:

- 1 Recognise the importance of heritage places.** This principle deals with the issue of significance. “Recognising, describing, understanding and communicating significance is a fundamental part of heritage conservation and responsible tourism at heritage places. Understanding significance makes good business sense for tourism – it is one of the key selling points for products”.
- 2 Look after heritage places** – it is the responsibility of all “people planning activities at heritage places to take all reasonable steps to avoid impact on the natural and cultural significance of a place”.
- 3 Develop mutually beneficial partnerships** between tourism operators, site managers, other businesses, local communities and Indigenous people.
- 4 Incorporate heritage issues into business planning.**
- 5 Invest in people and place:** Tourism involving heritage places should contribute to both the conservation of heritage assets and to the economic and social well-being of local communities.

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<sup>30</sup> Australian Heritage Commission (forthcoming). The Australian Heritage Commission has given permission for me to quote from the manuscript of the final draft that is with the printer at the time of writing. I have been a member of the Steering Committee for the *Successful tourism at heritage places* project.



- 6 **Market and promote products responsibly** – they should recognise and respect significance, respect the wishes of local communities and not create unrealistic or inappropriate visitor expectations.
- 7 **Provide high quality visitor experiences** – provide for visitor enjoyment combined with an understanding of place.
- 8 **Respect Indigenous rights and obligations** – any tourism activity involving Indigenous people should be discussed and agreed with the relevant community. Cultural protocols and intellectual property rights should be respected.

**Guidelines** are given for these specific issues:

- 1 Understanding heritage significance
- 2 Forming partnerships
- 3 Creating a quality visitor experience
- 4 Developing Indigenous tourism
- 5 Planning for a sustainable business.

## 2 *Tourism with Integrity*

*Tourism with Integrity*,<sup>31</sup> published at the end of 1999, was developed through the Department of Communications, Information Technology and the Arts and AusIndustry. This national project was designed to help cultural and heritage organisations work more effectively with the tourism industry. I led the project team that developed and trialed the model.

It provides a practical framework for cultural and heritage organisations wanting to observe cultural and heritage values and management principles, while building visitor numbers and working successfully with the tourism industry to increase their revenue base. In addition to heritage places, it includes collections, a range of arts activities and event management. It incorporates principles of community consultation and involvement at every level.

The *Tourism with Integrity* model is built around a self-assessment process that can guide organisations in identifying how they are performing on a range of indicators. “The framework offers a structured way for organisations to identify areas for improvement and to set their own priorities to put processes in place to achieve

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<sup>31</sup> Department of Communication, Information Technology and the Arts 1999

them.”<sup>32</sup> It is designed to be used on a continuing basis, so that organisations can consciously adopt a commitment to ongoing improvement.

The organisational activities it addresses fall into four areas:

- **Planning and information essentials** covers business planning and organisation information.
- **Specific Focus** includes collections management, management of heritage places, interpretation and presentation, community arts and event management.
- **Building a customer base** covers service standards, meeting customer needs, marketing and working with local communities.
- **General management** includes natural environment management, legal compliance, financial management, human resources and data, records and information management.

In all, there are twenty categories in the Level 1 model, which is the one most suited to small organisations. It works equally well for organisations run by volunteers, a mixture of paid staff and volunteers or paid staff alone.

The Level 2 model, drawn from the Australian Business Excellence Framework, is more conceptually based and is “most relevant to larger organisations with a strongly developed management structure”<sup>33</sup>. We ran pilot projects in two States and workshops around Australia during the 2 year development of the *Tourism with Integrity* models. There was intense interest in the Level 1 model and little in the Level 2 model. The main reasons for this are that the Level 1 model gives a detailed, practical guide that operates in part as a comprehensive checklist. The Level 2 guide is too abstract for organisations unused to thinking conceptually about management. And we found that the organisations with the conceptual experience were convinced that they didn’t need to use this model.

The trials and workshops also showed that organisations used the model differently from the way we had initially anticipated. The Level 1 categories are set out in fine logical order – beginning with planning (we know who we are, what we do and where we are going) and the essential information that an organisation keeps and disseminates about itself both internally and to the outside world. These seemed to us to be the most sensible starting points. However, we found that most people wanted to start with the categories they were most interested in and most comfortable with – so that museum curators for instance, would tend to look first at collections policy and someone in charge of publicity would want to work through marketing and working with local communities.

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<sup>32</sup> *ibid*: 1

<sup>33</sup> *ibid*: 81

The framework is robust enough to be approached from any one of the twenty possible starting points, or it can be divided up and different sections of it can be tackled by different parts of the organisation.

For instance, one pilot project was carried out with the Mannum Dock Museum Board, which runs the Mannum visitor information centre, operates the paddle steamer PS *Marion*, is setting up a museum of River Murray history and plans to excavate and restore the Randall dry dock. Here, we set up four different workshops. Each one dealt with a different set of categories, that were grouped to match different sorts of volunteer interests – marketing, boat operations, museum and exhibition planning and administration. All the volunteers were invited to come to all the workshops, so that people who were interested in attending any workshop could do so. The end result was a detailed improvement plan that reflected the input of between 30 to 40 volunteers, with a high level of ownership of the recommended actions across all areas of activity.

A different pattern evolved in one of the other pilot projects - with the Burra branch of the National Trust in South Australia. This branch manages the heritage tourism aspects of the town of Burra, including managing the visitor centre, the Burra Passport tour system, a number of heritage sites and four museums. I ran several workshops with branch members, anticipating that each workshop would cover different ground and that we would eventually work through all the Level 1 categories. In fact, different people came to each of the workshops. Most of them wanted to work through the categories that the previous group/s had already worked through, so that is what we did. Ultimately, this meant that around 40 of the Burra National Trust members had worked through about half of the categories, and felt comfortable with the issues that had been identified as being priorities for improvement. Other key areas, like Occupational Health and Safety, that had not been covered in the workshops, were referred to the relevant subcommittees of the Burra branch. I was very happy with this outcome, as it indicated that the Burra National Trust felt sufficiently comfortable with the framework and the process to take it over themselves.

Building ownership of improvement planning and activities within organisations is an important outcome for this process. Paid staff and volunteers from all areas pilot organisations need to be involved in discussing issues and developing their own solutions and priorities so that this sense of ownership can be developed. This structured framework provides a neutral vehicle for dealing with what are often high conflict zones within organisations, and the very process of going through the self-assessment and priorities setting builds broad-based ownership of the outcome.

The Burra National Trust is strongly committed to planning as part of its normal business operations. Many organisations are not. Nevertheless, I suggest that all

organisations at least undertake the self-assessment scoring process for Statement 1.1(p21): “We have a clearly stated vision that reflects our long-term purpose, identity, philosophy and values.” The explanatory notes for this statement add: “This should identify what is fundamentally important to your organisation”. Working through these questions should make it clear whether tourism will be consistent with your long term purpose and values, including heritage significance. If it is not, then appropriate conservation management strategies need to be developed assuming minimum levels of visitation. If tourism *is* an option, then its ramifications need to be considered carefully. Success in tourism doesn’t come just because you think it will – it has to be carefully planned and you have to make it happen.

*Successful Tourism at Heritage Places* and *Tourism with Integrity* will be used differently. *Successful Tourism* will be a reference point for principles and general guidelines. *Tourism with Integrity* gives a detailed checklist against which organisations can assess their own performance and work out a structured improvement plan that reflects their own priorities. Each complements the other, and gives further points of reference to relevant codes of practice and accreditation schemes.

Together, they provide a theoretical framework and practical tools that can help heritage and tourism to work together successfully, and with integrity.

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