

The Impact of Culture on Tourism



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Foreword

The OECD Tourism Committee has carried out an extensive research into the role of culture and tourism in enhancing destination attractiveness and competitiveness. The work has also focused on country practices in this area.

This book provides an analysis of the relationship between tourism, culture and the attractiveness and competitiveness of destinations. It reviews national or regional experiences and practices of destinations where cultural resources are driving overall attractiveness. It also examines the development of tourism production and distribution processes in relation to cultural resources, identifying the key factors and policy interventions which can maximise the attractiveness of destinations as places to visit, live and invest in.

The analysis of this book is largely based on case studies provided by the following OECD countries: Australia, Austria, France, Greece, Italy, Japan, Korea, Mexico, Poland, Portugal, Romania, Slovakia and Turkey. The case studies illustrate different aspects of the relationship between tourism, culture and regional attractiveness and the policy interventions which can be taken to enhance this relationship. A selection of case studies is included (Australia, Austria, Korea, Mexico and Poland).

This publication concludes that culture and tourism have a mutually beneficial relationship which can strengthen the attractiveness and competitiveness of destinations, regions and countries. Culture is increasingly an important element of the tourism product, which creates distinctiveness in a crowded global marketplace. At the same time, tourism provides an important means of enhancing culture and creating income which can support and strengthen cultural heritage, cultural production and creativity. Creating a strong relationship between tourism and culture can therefore help destinations to become more attractive as well as more competitive as locations to live, visit, work and invest in.

We would like to acknowledge the contribution of Greg Richards who drafted the core of the publication. The publication was managed and edited

by Alain Dupeyras, Head of the Tourism Programme, and Hyunhwan Kim, Principal Administrator and Adèle Renaud of the tourism unit.

This book is intended for academics, policy makers and practitioners and those in the tourism sector who want to understand the relationship between culture, tourism and destination attractiveness.

A handwritten signature in black ink, consisting of a large, sweeping oval shape with a vertical line through it and some smaller strokes below.

Sergio Arzeni
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and Local Development

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Executive Summary

The aim of this book is to analyse the relationship between tourism, culture and the attractiveness and competitiveness of destinations. In doing so, this book reviews national/regional experiences and practices of destinations where cultural resources are driving overall attractiveness. It also examines the development of tourism production and distribution processes in relation to cultural resources. From the analysis, the book identifies some key factors and policy interventions which can maximise the attractiveness of destinations as places to visit, live and invest in.

Based on a range of case studies collected by the OECD Tourism Committee as well as external material, the analysis identifies best practice and the most effective policies for enhancing the attractiveness of destinations capitalising on their cultural resources. Case studies have been provided by Australia, Austria, France, Greece, Italy, Japan, Korea, Mexico, Poland, Portugal, Romania, Slovakia and Turkey. The case studies illustrate different aspects of the relationship between tourism, culture and location attractiveness and the policy interventions which can be taken to enhance this relationship. Some of the case studies mentioned are available at www.oecd.org/cfe/tourism.

The book also considers the wider benefits of developing the relationship between tourism and culture, such as enhanced image, social cohesion, support for the cultural sector, increased innovation and creativity.

Roles and impacts of culture and tourism on attractiveness and competitiveness of destinations

This book indicates the importance of culture and tourism as drivers of attractiveness and competitiveness. Many regions are now actively developing their tangible and intangible cultural assets as a means of developing comparative advantage in an increasingly competitive tourism marketplace, and to create local distinctiveness in the face of globalisation.

Culture and tourism have a mutually beneficial relationship which can strengthen the attractiveness and competitiveness of places, regions and countries. Culture is an increasingly important element of the tourism product as it creates distinctiveness in a crowded global marketplace. At the

same time, tourism provides an important means of enhancing culture and creating income which can support and strengthen cultural heritage, cultural production and creativity.

Culture and tourism are linked because of their obvious synergies and their growth potential. Cultural tourism is one of the largest and fastest growing global tourism markets and the cultural and creative industries are increasingly being used to promote destinations. The increasing use of culture and creativity to market destinations is also adding to the pressure of differentiating regional identities and images, and a growing range of cultural elements are being employed to brand and market regions.

Partnership is essential. The complexity of both the tourism and cultural sectors implies that platforms must be created to support collaboration, and mechanisms must be found to ensure that these two sectors can communicate effectively. Local communities are beginning to come together to develop cultural products for tourism rather than competing directly with one another. New policies are likely to feature new structures and projects involving public-private partnership and bringing together a wider range of stakeholders to use culture not only to make destinations attractive for visitors, but also to promote regions as destinations to live, work and invest in.

Culture in all its forms is likely to figure strongly in the tourism product and promotion of most regions, even those which have traditionally relied on their natural assets, such as sun and beach or mountains, for their attractiveness. Destinations are also trying to increase their comparative advantage by adding to their stock of cultural attractions. They are also trying to develop their intangible culture and creativity.

*Policies and programmes for culture
and tourism*

This book analyses policies and programmes that national and local governments have developed with respect to culture and tourism, how and why these policies have been implemented and their results. It draws on a number of case studies on culture and tourism by OECD members and non-member economies, some of which are presented in this publication. The role of these policies has increased in recent years given evidence provided on their impacts on local economic development and job creation, notably in areas undergoing economic restructuring.

According to these case studies, the main drivers for developing culture and tourism policies are enhancing and preserving heritage, economic development and employment, physical and economic regeneration,

strengthening and/or diversifying tourism products, retaining the population, developing cultural understanding and externalities for the local economy.

The overarching objective of the programmes examined is to improve the economic, cultural and social positions of the targeted destinations. The main areas of intervention relate to infrastructure improvement, heritage preservation, economic development, regional identity and image branding, tourism diversification, quality improvements and tourism facilities.

The case studies also underline the importance of co-operation between the tourism and cultural sectors, as well as between different levels of government and the private sector. Public-private partnerships are central in this co-operation process, notably to develop market-oriented culture and tourism “products” and to market these products to consumers.

The core funding for cultural tourism programmes comes from the public sector, even though complementary funding is provided by the private sector. Public funding has limitations and make project leaders dependent on a public sector funding cycle which creates uncertainty about funding levels. To alleviate these problems, it is suggested that the public sector develop alternative funding sources and introduce multi-annual funding programmes.

Culture creates authenticity and distinctiveness in the global tourism market. In this regard, “tourism experiences” that can connect people and visitors to local cultures are very important. In many cases, the theming of destinations is also linked to specific cultural events (*e.g.* connected to famous places, people or historical events) which can also play a catalyst role in this development.

The involvement of the local communities is an important factor for visitor satisfaction and a prerequisite for product development. Local communities are not just the hosts for tourism, but they are also participating directly in the tourism experience, helping to define the sense of place and atmosphere of regions. In a number of the case studies covered by this book, the support of the local community has proven to be essential in developing cultural experiences for tourists.

One of the most important ways in which public authorities can assist in the development of culture and tourism products is through marketing activities. Because of the complexity of the culture and tourism product, very often there is a need to create marketing consortia and to give regional products exposure in national and international markets. Regions are creating specific marketing alliances to showcase cultural tourism opportunities, and in some cases, different regions are beginning to work together. Internet has become an almost universal marketing tool in recent

years which offers the possibility for tourists to package cultural sites and events with accommodation and travel.

Monitoring the effects of cultural and tourism policies and programmes is essential to demonstrate that these policies are effective and to guide future policy making. In most cases, however, measurement and evaluation are too general and do not focus on particular programmes. Sometimes there is no evaluation at all.

The most successful destinations are those which recognise the wider implications of the relationship between tourism and culture, particularly in terms of attracting new residents and inward investment. At present, these issues are rarely considered in programmes of cultural and tourism development, because these two sectors are individually associated with narrow sectoral development. However, there is growing evidence that culture and tourism may act as a powerful combination to attract people and investment.

Evidence from case studies indicates that the main factors linking tourism and culture to competitiveness and attractiveness include the ability of culture to provide distinctiveness for tourism, the ability of tourism to support tangible and intangible culture, the role of regional stakeholders, the leadership qualities of public sector stakeholders and administrative arrangements for tourism and culture.

The most successful cultural and tourism regions seem to be those that manage to lead inclusive groups of stakeholders from both public and private sectors in developing and marketing a wide range of cultural and creative resources for tourism. These resources also tend to be developed in such a way that they add to, rather than diminish, regional distinctiveness and underline the authentic culture and creative expressions of the region. Successful policies are also those which take a wide approach to culture and tourism, seeing them as factors which can boost the attractiveness of regions not just as destinations to visit, but also as those to live, work and invest in.

Conclusions and policy implications

The most important policy implication seems to be that leadership is required to provide the long-term vision, positioning, partnership arrangements and innovative products necessary to succeed in a highly competitive global market. A long-term view is also particularly important because changing the image of a destination or increasing its attractiveness is not something that happens overnight. In most cases, a period of 20-25 years is required to realise the full benefits of sustained interventions in the field of culture and tourism, as the examples of Glasgow and Barcelona

indicate. A whole series of steps need to be taken to develop a successful synergy between culture and tourism, and these need an adequate strategy to be established.

The most important aspect in linking tourism and culture is to develop an effective partnership between stakeholders in the two sectors. In many cases the problem is that there are different approaches: the profit motive vs. non-profit, markets vs. public, etc. The role of any platform trying to bring these two sectors together must be to identify their common interests and to act as a mediator between them. It is clear that there is a common interest in the attraction of people to the regions in which they are based, but very often differences approach get in the way. In the tourism sector it is normal to speak about visitors, conceived of as customers or clients, whereas the cultural sector is more concerned with residents, usually seen as audiences or citizens. These differences can be overcome when it is made clear that tourists are also part of the cultural audience.

As well as partnership between tourism and culture, it is also important to build other forms of partnership, for example with other regions, between the public and private sectors and between a region and its citizens. Links between regions can extend the cultural opportunities available to tourists and help to support new and innovative product offers. Working with the private sector is essential for attracting investment and continuing to improve the quality of both the cultural and tourism offer. Convincing residents of the benefits of tourism development is increasingly crucial as they come to form the core of the cultural and creative tourism experience. Migrant groups among the resident population are also important partners, not only because cultural diversity adds to the attractiveness of regions, but also because their links with their home culture can also provide important motivations for visitation.

In the long term, regions will have to be increasingly innovative in the way in which they develop, manage and market culture and tourism. This is particularly true if they want to extract the full range of benefits from this relationship for people who visit, live, work and invest in the region. Among the issues that regions will likely have to address are the following: a) challenges of funding culture; b) the need to create sustainable relationships and avoid tourism damaging cultural resources; c) the integration of cultural, tourism and national/local development strategies; and d) multicultural societies and intercultural dialogue.

Part I. Increasing the Attractiveness of Destinations through Cultural Resources

Chapter 1. Introduction

Aims and objectives

Culture and tourism have a mutually beneficial relationship which can strengthen the attractiveness and competitiveness of regions and countries. Culture is increasingly an important element of the tourism product, which also creates distinctiveness in a crowded global marketplace. At the same time, tourism provides an important means of enhancing culture and creating income which can support and strengthen cultural heritage, cultural production and creativity. Creating a strong relationship between tourism and culture can therefore help destinations to become more attractive and competitive as locations to live, visit, work and invest in.

The aim of this book is to analyse the relationship between tourism, culture and the attractiveness and competitiveness of destinations. In doing so, it:

- Reviews national or regional experiences and practices of destinations where cultural resources are driving overall attractiveness.
- Examines the development of tourism production and distribution processes in relation to cultural resources.
- Identifies factors of success or failure of initiatives for enhancing attractiveness of the location for visitors, residents or investors.
- Examines the role of public policies in this area, with particular focus on tourism.

This publication identifies some of the key factors and policy interventions which can maximise the attractiveness of destinations as places to visit, live and for inward investment.

Based on a range of case studies collected by the OECD as well as on external material, the analysis identifies best practices and the most effective policies for enhancing the attractiveness of destinations, capitalising on their

cultural resources. The case studies aim to illustrate different aspects of the relationship between tourism, culture and regional attractiveness and the policy interventions which can be taken to enhance this relationship.

The available data on the relationship between culture, tourism and regional development are somewhat limited. Although culture is a major motivator for tourism, relatively few countries or regions collect specific data on the volume or patterns of tourism consumption related to culture. The only specific international survey of cultural tourists is the *ATLAS Cultural Tourism Survey* (www.tram-research.com/atlas), which has been running since 1992 (Richards, 2007). This has limited coverage of countries and regions, but provides surveys of tourists at the destination, allowing the motivations and behaviour of tourists in respect to culture to be compared at local and regional level. These surveys cannot, however, identify the proportion of all tourists who participate in cultural activities or who are attracted by culture. For this, a general household survey, such as the *European Tourism Monitor*, has to be used. Both of these information sources were utilised for the UNWTO/ETC study of *City Tourism and Culture* in 2004, and some of the results are updated here.

This book also considers the wider benefits of developing the relationship between tourism and culture, such as enhanced image, social cohesion, support for the cultural sector, increased innovation and creativity.

Chapter 2. Roles and Impact of Culture and Tourism on Attractiveness

Tourism has assumed a vital role in the development of destinations around the world. In most cases, culture is a major asset for tourism development as well as one of the major beneficiaries of this development. Culture is a major factor in the attractiveness of most destinations, not only in terms of tourism, but also in attracting residents and inward investment. In this section of the book, the growing relationship between tourism and culture, and the way in which they have together become major drivers of regional attractiveness and competitiveness, will be examined.

The developing relationship between culture and tourism

During most of the 20th century, tourism and culture were viewed as largely separate aspects of destinations. Cultural resources were seen as part of the cultural heritage of destinations, largely related to the education of the local population and the underpinning of local or national cultural identities. Tourism, on the other hand, was largely viewed as a leisure-related activity separate from everyday life and the culture of the local population. This gradually changed towards the end of the century, as the role of cultural assets in attracting tourists and distinguishing destinations from one another became more obvious. In particular, from the 1980s onwards “cultural tourism” became viewed as a major source of economic development for many destinations.

The growing articulation between culture and tourism was stimulated by a number of factors:

- Demand
 - Increased interest in culture, particularly as a source of identity and differentiation in the face of globalisation.
 - Growing levels of cultural capital, stimulated by rising education levels.

- Aging populations in developed regions.
- Postmodern consumption styles, emphasising personal development rather than materialism.
- A desire for direct forms of experience (“life seeing” rather than sightseeing).
- Growing importance of intangible culture and the role of image and atmosphere.
- Increased mobility creating easier access to other cultures.
- Supply
 - Development of cultural tourism to stimulate jobs and income.
 - Cultural tourism was seen as a growth market and “quality” tourism.
 - An increasing supply of culture as a result of regional development.
 - The growing accessibility of information on culture and tourism through new technologies.
 - The emergence of new nations and regions eager to establish a distinct identity (*e.g.* the impact of newly-independent states in Central and Eastern Europe).
 - A desire to project the external image of regions and nations.
 - Cultural funding problems related to increasing cultural supply.

As a result, culture has been increasingly employed as an aspect of the tourism product and destination imaging strategies, and tourism has been integrated into cultural development strategies as a means of supporting cultural heritage and cultural production. This synergy between tourism and culture is seen as one of the most important reasons for encouraging a more direct relationship between these two elements. This relationship is even more significant, given the growing importance of both tourism and culture for economies around the globe. The OECD estimates that international tourism accounts for approximately 30% of global service exports in 2006 (OECD 2008). Similarly, culture and creativity are increasingly being recognised as important economic drivers. An OECD study on the economic importance of culture indicated that in several major economies, the value of the cultural industries was between 3% and 6% of the total economy (Table 2.1).

Table 2.1. OECD estimates of culture industries contribution to national GDP/GVA

COUNTRY	DATE	CURRENCY	VALUE (MILLIONS)	% OF TOTAL ECONOMY
Australia	1998-99	AUD	17 053	3.1%
Canada	2002	CAD	37 465	3.5%
France	2003	EUR	39 899	2.8%
United Kingdom	2003	GBR	42 180	5.8%
United States	2002	USD	341 139	3.3%

Source: OECD (2007) International Measurement of the Economic and Social Importance of Culture

The combination of tourism and culture is therefore an extremely potent economic engine. According to Europa Nostra (2005) “more than 50% of tourist activity in Europe is driven by cultural heritage and cultural tourism is expected to grow the most in the tourism sector.” Similar positive assessments can be found elsewhere, usually based on UN World Tourism Organization estimates that cultural tourism accounts for 40% (Table 2.2) of international tourism (Richards, 2007).

Table 2.2. Total volume of international cultural tourism

YEAR	TOTAL INTERNATIONAL ARRIVALS	PERCENTAGE CULTURAL TRIPS	TOTAL NUMBER OF CULTURAL TRIPS
1995	538 million	37%	199 million
2007	898 million	40%	359 million

Source: Estimates from UNWTO figures

In the U.S., surveys of “historic/cultural travellers” indicate that 30% of domestic tourists are influenced in their choice of destination by a specific art, cultural or heritage event or activity. The volume of historic/cultural travel grew 13% between 1996 and 2002, from 192.4 million person-trips to 216.8 million person-trips, slightly faster than domestic travel as a whole. The important role of art and heritage is also confirmed by market research from Canada, which indicates that almost 100 million trips taken by U.S. residents in 2003 were culture-related, almost 50% of the total (Table 2.3).

The Canadian research indicates a high degree of crossover between visual arts and heritage consumption. Over 50% of U.S. arts visitors to Canada also visited museums, and 50% also visited festivals. There is also a high degree of crossover between visual arts and wine/culinary tourists. Visual arts enthusiasts are also likely to be interested in the performing arts as well.

Table 2.3. Motivation of U.S. traveller segments

SEGMENT	NUMBER OF PEOPLE (MILLIONS)
Visual Arts	27.6
Performing Arts	15.6
Heritage	34.5
Wine/Culinary	21.6
Soft Outdoor Adventure	35.5
Hard Outdoor Adventure	15.7
Winter Outdoors	15
Alpine Skiing	21.4
All Adults 18+	200.4

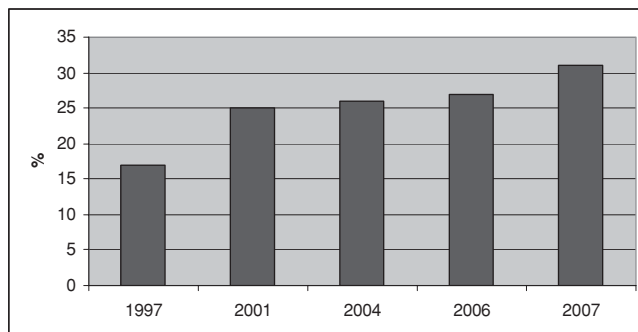
Source: Tourism Canada

The ATLAS research also indicates that the proportion of cultural visitors with a specific cultural tourism motivation has grown in recent years (Figure 2.1).

These figures show the importance of culture in influencing tourism flows. Culture is also seen as an important aspect of the tourism product by NTAs, National Tourism Organisations (NTOs) or regional marketing organisations because it is seen as a very large market which attracts high spending visitors (Figure 2.2), which is growing rapidly and is seen as a “good” form of tourism to promote (Richards, 2001).

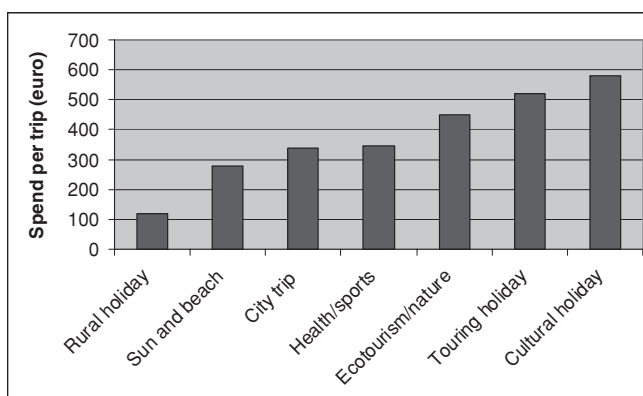
Cultural tourism is particularly attractive because of the raft of benefits it can deliver to local communities. According to the National Trust for Historic Preservation in the U.S., these benefits include:

- Creating jobs and businesses.
- Increasing tax revenues.
- Diversifying the local economy.
- Creating opportunities for partnerships.
- Attracting visitors interested in history and preservation.
- Increasing historic attraction revenues.
- Preserving local traditions and culture.
- Generating local investment in historic resources.
- Building community pride in heritage.
- Increasing awareness of the site or area's significance.

Figure 2.1. Proportion of tourists on a cultural holiday

Source: ATLAS Surveys 1997-2007

The widespread cultural, economic and social benefits mean that policies promoting linking culture and tourism or the narrower development of “cultural tourism” have become evident worldwide at continental, national and regional levels. In Europe, for example, the European Commission promotes cultural tourism as a means of underpinning the “unity in diversity” of the EU population. Travelling to experience the culture of others allows tourists and hosts to appreciate cultural difference as well as underlying cultural ties. In Australia and Canada, culture and tourism have been linked to the development of economic opportunities for indigenous peoples. In Africa (Box 2.1), Latin America and Asia, cultural tourism is often seen as a means of supporting heritage conservation as well as raising local incomes (Richards, 2007).

Figure 2.2. Spending by holiday type per trip

Source: ATLAS surveys 2006

Box 2.1. Displaying Kenyan culture: cultural *manyattas*

In Kenya, “cultural *manyattas*” were developed around the Amboseli National Park to help marginalised groups of the Maasai community. The Maasai people earn money from these special homesteads where tourists come to visit, hear and experience Maasai culture. Each *manyatta* has a central market where people sell their craft products. The cultural *manyatta* is a co-operative, and on arrival, each tourist pays an entrance fee. On entering, the tourists are welcomed with song and dance by Maasai women. A resident guide will then show them around the *manyatta*, there are demonstrations of Maasai life and towards the end of the visit, the warriors stage a dance which the visitors are permitted to join. The Association for Cultural Centres in the Amboseli Ecosystem (ACCA) was established “to generate ideas and implement decisions that are favourable to the local community with a view to improving their incomes accrued from tourism activities while enhancing the dignity of Maasai people and protecting the ecological integrity of the Amboseli ecosystem”.

Another Kenyan model is the “*Bomas of Kenya*” on the outskirts of Nairobi. This cultural centre was established in 1972 as a major cultural and educational centre for both domestic and international tourists. The centre offers cultural dances and art performances and there are 11 model cultural villages which portray ethnic architecture, displays and material culture from different Kenyan ethnic communities. Most domestic tourists (89%) and international tourists (98%) stated that they had a satisfactory cultural experience there.

Source : Akama and Sterry (2002)

In many urban areas, cultural institutions have been used to spearhead the regeneration of run-down areas, rejuvenating local economies and increasing property values. In rural areas, tourism is used to support traditional livelihoods and crafts and sustain communities threatened with out-migration. For example, visitors to summer festivals in Gaelic-speaking areas of the Highlands of Scotland not only bring much needed money to remote areas, but also help sustain the local language and traditions (McLean, 2006). Cultural tourism can be particularly important for rural areas, since there are often few alternative sources of income.

The closer links between tourism and culture are also reflected in governance structures at national and regional levels. A growing number of countries (about 25 in the world, of which 4 in the OECD area) are combining administrative structures for culture and tourism, for example, in a single ministry.

In the case of the U.K., the link between tourism and culture was originally made on the basis of the importance of “national heritage” for tourism and *vice versa*. Now, countries are beginning to link creativity and tourism directly. For example, Singapore has in recent years been developing itself as a “Global City for the Arts” and tourism has been highly

influential in supporting this ambition. SO much so that the Singapore Tourist Board has been given responsibility for marketing the arts and promotion of cultural tourism in the creative economy (Ooi, 2007).

These developments point to the fact that in spite of the many different contexts and driving factors for cultural and tourism policies, there is growing convergence of culture and tourism as a factor in national and regional attractiveness, which is also driving the formation of administrative structures which attempt to address the new reality.

Issues of definition

The diversity of approaches to the relationship between tourism and culture underlines the problems of definition which exist in this field. Because culture touches every aspect of human life, it can be argued that everything is cultural. According to this view, all tourism might be considered as “cultural tourism”, because “all movements of persons...satisfy the human need for diversity, tending to raise the cultural level of the individual and giving rise to new knowledge, experience and encounters” (UNWTO 1985). This broad approach is not very useful because it does not allow us to identify those forms of culture which are particularly important for tourism, and *vice versa*.

Richards (1996) suggested that early approaches to the relationship between tourism and culture tended to be based on the “sites and monuments” approach, where the cultural attractions of a country or region were basically seen as the physical cultural sites which were important for tourism. This approach informed the compilation of the Cultural Tourism Inventory for Europe in the 1980s, for example. Gradually, however, a broader view of culture in tourism emerged (Box 2.2), which included the performing arts (Hughes, 2000), crafts (Richards, 1999), cultural events, architecture and design, and more recently, creative activities (Richards and Wilson, 2006) and intangible heritage (UNESCO) (Figure 2.3).

This has also stimulated a move away from product-based to process-based or “way of life” definitions of culture. Tourists increasingly visit destinations to experience the lifestyles, everyday culture and customs of the people they visit.

Box 2.2. Australia: A broad definition of “culture”

In the Australian case study, the definition of “culture” includes but is not limited to:

- History and heritage
- Gastronomy and agricultural products
- Agriculture and wine (including regions)
- Cultural events (*e.g.* festivals)
- Creative industries
- Architecture
- Handicraft (including craft markets, etc.)

In many destinations, the “creative industries” or the “cultural industries” have also been identified as having an important relationship with tourism. As tourism increasingly shifts away from its previous preoccupation with landscapes and natural resources (sun, sea and sand, for example), tourists become more involved in symbolic and sensory consumption of the images and ideas associated with particular destinations. People want to go to destinations which are associated with particular famous people, ideas or events, and they want to experience the sights, sounds and it seems especially the tastes of the destinations they visit. According to the Travel Industry Association of America and the National Restaurant Association (2008), food is central to deciding vacation destinations for at least 25% of leisure travelers and 58% stated that they are somewhat/very interested in taking a trip to engage in culinary or wine-related activities.

This expanding notion of the cultural consumption of tourists (as well as an increasing tendency not to distinguish between tourists and other visitors) makes the definition of cultural tourism or culturally-motivated tourism increasingly difficult.

Figure 2.3. The characteristics of heritage tourism, cultural tourism and creative tourism

Form of Tourism	Primary Time Focus	Primary Cultural Focus	Primary Form of Consumption
Heritage Tourism	Past	High Culture Folk Culture	Products
Cultural Tourism	Past and Present	High and Popular Culture	Products and Processes
Creative Tourism	Past, Present and Future	High, Popular and Mass Culture	Experiences and Transformations

Source: Richards 2001

Culture and tourism as drivers of regional attractiveness and competitiveness

Regional attractiveness and competitiveness are directly linked. Countries and regions increasingly have to compete to attract residents, visitors and inward investment. Kotler, Haider and Rein (1993:14) have suggested that: “Every place - community, city, state, region, or nation - should ask itself why anyone wants to live, relocate, visit, invest, or start or expand a business there. What does this place have that people need or should want? What competitive advantages does this place offer that others do not?”

What different destinations have to offer depends not just on economic factors, *e.g.* standards of living or locational factors such as accessibility, but also on intangible factors such as the “atmosphere” of a place or its general quality of life. In analysing attractiveness, many studies have borrowed from the work of Porter (1990) on competitiveness. Porter’s “diamond” features the main “drivers” of competitiveness: factor conditions, demand conditions, related and supporting industries, and firm strategy, structure, and rivalry. For tourism, the factor conditions have traditionally been most important for destination attractiveness, both in terms of “inherited factors” (natural resources such as beaches, climate, etc.) and “created factors” (such as

cultural attractions, events, etc.). But increasingly, destinations have to mobilise all their factor conditions more effectively through industry restructuring, product innovation and marketing in order to compete.

Box 2.3. Rio de Janeiro: Developing attractiveness through events

The Rio authorities used the high-profile summit between the heads of state and governments of Latin America and the Caribbean and the European Union to show off its new “*Favela-Bairro*” project, which brought basic city services into the *favelas*. As well as raising the city’s public profile, it lifted the spirits of the *cariocas* (local people from Rio) living in the *favelas*. The city also used the event as an opportunity to undertake a major renovation of its tourist sites and waterfront. Instead of using a convention centre on the outskirts of town, Rio decided to put the summit in its long-ignored Museum of Modern Art in the heart of the city. The city renovated the museum, including painting a big colourful mural on the outside wall and re-starting its long-disused fountain. Also, the well-known Copacabana and Ipanema beaches were returned to pristine condition. Rio’s facelift attracted tourists and business interest, which brought money into the city. The renewed attitude to the city’s poor, as well as the regeneration of their city, was not only well broadcast using the EU summit as a springboard, but also engaged the local people with the authorities and raised pride and employment.

Source : OECD (2008)

As Porter (2002:32) later notes: “Almost everything matters for competitiveness. The schools matter, the roads matter, the financial markets matter, customer sophistication matters, among many other aspects of a nation’s circumstances, many of which are deeply rooted in a nation’s institutions, people, and culture.”

Culture *per se* is rarely included in measurements of regional competitiveness (PWC 2005), partly because it is difficult to measure and partly because it is not seen as central to location decisions.

Wikhal (2002:1) argues: “The capacity to attract people by offering a good quality of life is of crucial importance for regional competitiveness. In studying regional attractiveness, it is important not only to consider what makes people move to a certain region but also what makes people want to stay.”

This study found culture to be one factor considered along with others (housing, employment, etc.) in destination decisions, and that culture tended to be valued most by the highly-educated and particularly those with an

artistic education. This seems to support Florida’s idea of the importance of culture for the creative class in particular (see below).

The concept of competitiveness has also been applied directly to tourism destinations. Crouch and Ritchie (1999) adapted Porter’s model to suggest that “destination attractiveness” depends on four components:

- Core resources and attractors (physiography, culture and history, market ties, mix of activities, special events, entertainment and superstructure).
- Supporting factors and resources (infrastructure, accessibility, facilitating resources, hospitality, enterprise).
- Destination management (resources stewardship, marketing, finance and venture capital, organisation, human resource development, information/research, quality of service, visitor management).
- Qualifying determinants (location, interdependencies, safety/security, awareness/image/brand, cost/value).

Similarly, Dwyer and Kim (2003) identify the factors that determine competitiveness as available resources (natural resources, cultural assets and heritage items), created resources (tourism infrastructure, the activities on offer, etc.), supporting factors (infrastructure in general, the quality of service, access to the destination, etc.) and destination management factors.

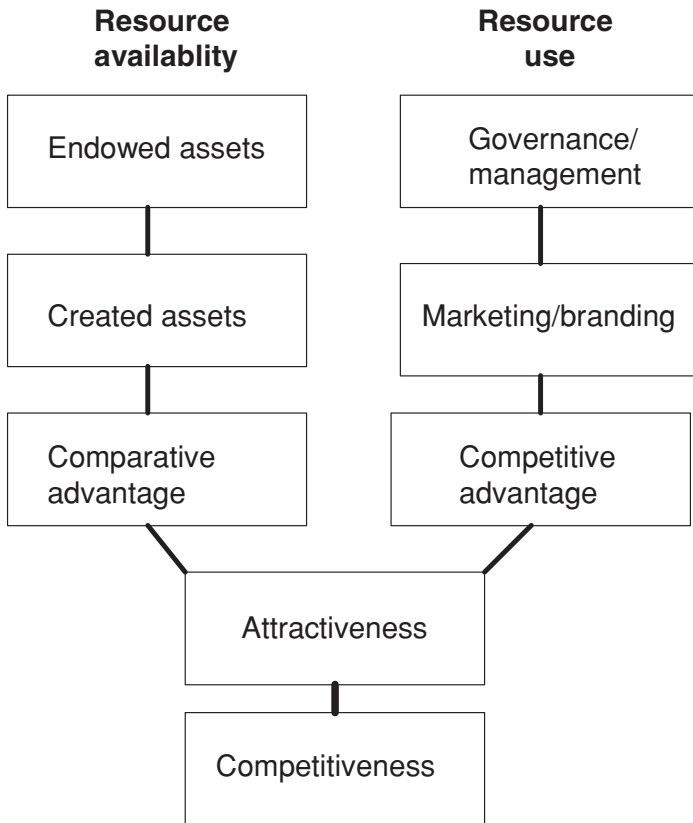
Both of these studies emphasise the role of assets which are inherited or created and the way in which these assets are organised and deployed in the market. Essentially, it seems, comparative advantage for destinations is derived largely from endowed resources (under which Dwyer and Kim include cultural heritage) while competitive advantage relies more on resource deployment (*i.e.* management and marketing of the destination). As the OECD report on rural areas (2003) notes: “In some cases, the most intangible aspects (entrepreneurship, cultural identity, participation, and partnerships) are the most important in making the difference. It is difficult to transform stocks into flows: *i.e.* valorise natural and man-made assets, strengthen the economic environment, invest in human resources, improve institutional capacity.”

Therefore, a destination may have a certain attractiveness based on its inherited assets. Its ability, however, to compete with areas to attract tourists or investment may also vitally depend on its ability to transform the basic inherited factors into created assets with a higher symbolic or sign value which may then be translated into higher market values.

Destinations have to organise their resources in the most efficient way to produce competitive advantage in the tourist market (Figure 2.4). Viewed from this perspective, “productive efficiency of a territory to produce tourist flows can be viewed as a proxy for destination competitiveness” (Cracolicia, *et al.*, 2006). This underlines the fact that tourism attractiveness is usually viewed from a consumer perspective, *i.e.* the assumption is that more tourists will visit more attractive destinations. Viewed from a regional perspective, however, one may have an intrinsically attractive region, but for various reasons (*e.g.* lack of promotion, problems of accessibility, political unrest) it is visited by fewer tourists than it “should” be.

This may explain the finding of Bellini, *et al.* (2007) that regions with higher levels of development “make better use of tourism resources”. In other words, organisational capacities allow some regions to make better use of their inherited and created assets to make themselves attractive to tourists.

Figure 2.4. A model of culture, tourism, attractiveness and competitiveness



Culture as a factor in the competitiveness of the creative destination

It is clear that culture is important for tourism and for the attractiveness and competitiveness of destinations. The most successful destinations are those that can create a positive synergy between culture and tourism. But this synergy does not happen automatically: it has to be created, developed and managed. In an OECD report on culture and local development (2005), Xavier Greffe identifies a number of criteria which are important in developing a positive relationship between tourism and culture:

- The permanence of cultural activities.
- The degree of participation by local people in addition to tourists.
- The territory's capacity to produce all the goods and services demanded on this occasion, *i.e.* the local context is paramount.
- Interdependence of these activities to foster “clustering effects”.

From the analysis of competitiveness models above, it might be added that the organisational capacity of a place (or the “orgware”) is also an important factor. From this perspective, it seems that governance and management of the relationship between tourism and culture are vital. This realisation has led some destinations which may not seem to have obvious cultural assets to develop policies of culture-led regeneration as a means of stimulating economic development and improving their image (Box 2.4).

However, intervention in the relationship between tourism and culture may be difficult for some destinations for a number of reasons. For example, in their study of cultural tourism governance in Europe, Paskaleva-Shapira, *et al.* (2004:87) finds that: “Small and medium-sized localities generally lack the financial and strategic resources to implement good urban governance for sustainable cultural tourism. Missing is a cohesive guidance on how to practically manage the sector that can potentially create an array of positive impacts in the economy as well as on a range of other assets, such as local heritage enhancement and urban quality of life.”

There is also the question of what elements of culture regional governments actually control. In some regions, freedom of action may be limited by the national management of key resources and, in other cases, governments may have much more control (Box 2.5). In other situations, the private and voluntary sectors may have a much larger role in cultural provision, underlining the need for partnership and networking (for example, see Box 3.12).

Box 2.4. Glasgow: Culture as a catalyst for economic growth and image change

Glasgow embarked on a campaign of economic regeneration and image change in the early 1980s, using culture as a major attraction. The city staged the European Capital of Culture in 1990 and opened a number of major new cultural facilities, including the Burrell Collection and the Glasgow Museum of Modern Art. This programme saw the image of the city improve dramatically: press coverage in the years before and after 1990 indicates a strong improvement. Positive coverage of the image of the city grew by over 17% between 1986 and 2003, while positive coverage of culture grew by more than 40% and tourism by 150%. This indicates a strong positive relationship between tourism, culture and place image. The increased attractiveness of the city also had economic effects: Between 1994 and 1998, the city's economy grew by 15.9% compared to 10.3% in Scotland and 11.4% for the UK as a whole. Some 29 640 people were employed in tourism-related activities in Glasgow in 2005, accounting for 7.6% of all jobs in Glasgow. In 1995, 1.49 million trips were made by visitors to Glasgow, generating GBP 263 million in expenditure. By 2005, this had increased to 2.8 million trips with expenditure of GBP 700 million. Glasgow is now the fourth most popular U.K. city destination for foreign tourists (excluding London).

Beyond tourism, the whole city has been revitalised as a place to live, work and invest in. The total population and the working age population of the city have increased since 2000, reversing a long period of decline. In 2006-07, hotel and leisure developments worth almost GBP 45 million (EUR 58 million, USD 89 million) were completed, and permission was granted for a further GBP 91 million of development. The city is now capitalising on its improved image through the brand “Glasgow: Scotland with style”, which is utilised not just in terms of tourism, but also to image the city as a vibrant place to live, work, invest and study. The creative rationale for the brand is subtly derived from Glasgow’s world-renowned cultural icon, Charles Rennie Mackintosh, and the “Glasgow Style” artistic movement of the early 1900s. Glasgow’s belief that culture is central to improving the quality of life of residents and visitors alike has been demonstrated by a commitment of GBP 200 million capital investment in cultural facilities between 2006 and 2011.

Sources: Garcia (2005); Glasgow City Council (2007); Leslie (2001)

Another major problem is that the management of cultural tourism is usually in the hands of many different actors, and the more intangible factors of the relationship between tourism and culture (quality of life issues, sustainability) are usually not taken into account in planning. Smaller regions and cities often lack the skills and/or resources to administer regional co-operation. Integrated management of tourism requires introducing governance styles and systems that involve local authorities, the tourism sector, local associations and the residents.

Box 2.5. Žilina Self-Governing Region, Slovak Republic: Challenges of cultural management

Different models of cultural policy can have advantages and disadvantages in terms of the development of tourism for culture. In the Žilina Self-Governing Region in Slovakia, for example, the government intervenes very directly in culture. The region administers 23 cultural organisations including four museums, five galleries, two theatres, two observatories, five regional cultural centres and five regional libraries. This direct control has advantages in the management of cultural institutions through direct financial instruments, and cost savings through central purchasing while guaranteeing the cultural autonomy of the institutions. At the same time, however, there are a number of disadvantages, including bureaucracy, lack of co-operation between government departments, insufficient financial resources, lack of political stability and insufficient development of commercial activities.

Creating effective collaboration is also a challenge because the tourism and cultural sectors often seem to be speaking a different language. This is largely to do with the culture of the two sectors, because the tourism sector is largely commercial, whereas the cultural sector often has a non-profit ethos.

The problems of collaboration are compounded by the fact that the cultural sector often finds it hard to identify direct benefits from developing tourism. As the public service ethos usually relates to serving the needs of residents or citizens, the rationale for serving non-resident tourists is usually framed in economic terms. However, the reality is that many cultural institutions currently derive relatively little direct economic benefit from tourists compared with tourism suppliers. In Canada, for example, for every tourist dollar spent between 1987 and 2002 less than CAD 0.06 was received by the entertainment sector (which includes, among others, culture and heritage institutions) compared with CAD 0.37 spent on transportation, and CAD 0.16 spent on accommodation and food and beverage (Canada, National Tourism Indicators). As the Canadian report notes: “As the vast majority of the drawing cards that motivate Canadians and international travellers to experience Canada are culture and heritage events and attractions, it is therefore important to investigate the unequal distribution of economic benefits in order help culture and heritage stakeholders to better position themselves within the tourism arena.”

Another barrier that may be emerging for some destinations in mobilising their cultural assets for tourism is the fact that intangible assets are becoming increasingly important in destination competition. Where countries used to concentrate on getting their national monuments on the

UNESCO World Heritage List, they now seem to be jostling to have their intangible assets listed on the new UNESCO Intangible Heritage register. This is just one important sign that competition in the cultural arena is no longer just about culture, but also creativity.

Tourism and creativity

Creativity has become a more important element in regional development strategies because (Richards and Wilson, 2007):

- The rise of the symbolic economy privileged creativity over cultural products.
- Regions and cities have increasingly used culture as a form of enhancement and therefore need to find new cultural products to create distinction in an increasingly crowded marketplace.
- Destinations which lack a richly built heritage need to find new means of competing with those that do.

Many countries, regions and cities are now profiling themselves as “creative”. Perhaps the first example was Australia, which positioned itself as a “Creative Nation” in 1994. The Helsinki region in Finland now positions itself as “the most creative region in Europe”, thanks to its high rating for research and development and ICT employment (Florida and Tinagli, 2004). The most important boost to creative development came from Richard Florida’s *The Creative Class* (2002), in which he argues that the basis of economic advantage has shifted away from basic factors of production, such as raw materials or cheap labour, towards human creativity. Destinations therefore have to develop, attract and retain creative people who can stimulate innovation and develop the technology-intensive industries which power economic growth. These creative people collectively make up the “creative class”. Importantly, Florida also emphasises that what is important to the creative class is the “quality of place”, which combines factors such as openness, diversity, atmosphere, street culture and environmental quality. These relatively intangible factors are now arguably more important than traditional cultural institutions in the locational decisions of creative people. One might also assume, therefore, that tourists would also be attracted to such destinations, since many tourists are in search of “atmosphere” and difference.

Cultural tourism strategies have therefore been supplemented by creative tourism products in many destinations, emphasising intangible and symbolic elements of regional culture, such as the “buzz” of particular

destinations, the local art “scene”, nightlife, ethnic quarters and local gastronomy (Richards and Wilson, 2006). The tendency for many of these aspects of creativity to be found in the same destinations has put a new emphasis on the development of creative or cultural clusters, labelled as “creative districts” or “cultural quarters” or “ethnic precincts”. Clustering is not just a quality of urban destinations, but can also be found in rural regions. In regions such as the North of England, for example, regional tourism authorities have been identifying and marketing clusters of heritage attractions, festivals and creative businesses as tourism products.

Conclusion

It is clear that tourism and culture have become increasingly closely linked as their role in regional attractiveness and competitiveness has become clearer. Culture in all its forms is likely to feature strongly in the tourism product and promotion of most regions, even those which have traditionally relied on their natural assets, such as sun and beach or mountains, for their attractiveness. Destinations are also trying to increase their comparative advantage by adding to their stock of cultural attractions (*e.g.* building new museums or heritage centres). They are also trying to develop their intangible culture and creativity (*e.g.* selling “atmosphere”, cultural events and gastronomy).

Increasingly, destinations are also developing competitive advantage in culture and tourism through new forms of organisation and marketing. For example, local communities are beginning to come together to develop cultural products for tourism rather than competing directly with one another (see Box 3.16). New policies are likely to feature new structures and projects involving public-private partnership and bringing together a wider range of stakeholders to utilise culture not just to make destinations attractive for visitors, but also to promote regions as destinations to live, work and invest in.

The next chapter looks at the way in which policies on tourism and culture have developed, drawing on the experience of a range of OECD members as well as other case studies.

Chapter 3. Policies and Programmes for Culture and Tourism

This chapter analyses the policies that central and local governments have developed with respect to culture and tourism, how and why these policies have been implemented and their results.

The policy context

As the economic and social challenges facing regions have increased in recent decades, so policies with respect to tourism and culture have tended to become more instrumental. The justification for conserving cultural heritage, for example, is now often framed in economic terms, such as creating employment or helping to create an attractive image which will attract visitors and inward investment. This is particularly evident in areas undergoing economic restructuring.

In the case of the Trenčín region in Slovakia (OECD case study), for instance, socio-economic objectives are high on the agenda in projects linking culture and tourism. This former industrial region suffers from 14% unemployment, far above the national average of 10%. The region used to depend on the mining industry, chemical industry and energy production, but lost jobs in primary and manufacturing industries now need to be replaced by service employment. There is a strong base for the development of the cultural industries, because the region has many crafts producers, working with wood, ceramics and textiles.

This pattern is repeated across many destinations in different parts of the world, as Table 3.1 indicates.

Table 3.1. Issues, aims and activities of OECD case study projects

COUNTRY	ISSUES	AIM	ACTIVITIES
Australia (Tasmania)	Need to provide diversification in visitor experiences throughout the region to increase the destination's attractiveness to support sustainable development	<ul style="list-style-type: none"> -Generate increased visitation, overnight stays and visitor expenditure -Encourage private and public investment -Provide benefit to local community -Enrich the overall visitor experience in the region 	<ul style="list-style-type: none"> -Location branding -Tasman Community Arts Group, concerts, regional brochures, and funding for infrastructure in the form of boating and visitor facilities
Austria (Vorarlberg)	<ul style="list-style-type: none"> -Lack of international profile -Lack of intensive exchange and communication activity between culture and tourism -Low profile as a culture and tourism destination 	<ul style="list-style-type: none"> -Identification and examination of chances and possibilities in culture tourism -Implementation of a SWOT analysis -Development of a future strategy with an international focus -Involvement of strategic partners in culture and tourism -Definition of critical success factors 	Networking
France (Metropolitan regions)	Need to increase attractiveness and competitiveness of French cities in face of perceived under-performance	Increase receptive function of major cities and enhance their impact on surrounding regions.	Improve and innovate tourism facilities

Table 3.1. Issues, aims and activities of OECD case study projects (continued)

COUNTRY	ISSUES	AIM	ACTIVITIES
Greece (Peloponnese)	<ul style="list-style-type: none"> -Underemployment in the primary sector -Structural problems of the labor force -Deficient organisation of the tourism sector -Large number of unexploited cultural resources -Sparse promotion of the cultural and tourism product of the periphery 	<ul style="list-style-type: none"> -Create an attractive setting for residents, investors and visitors -Enhance the economic, environmental and social performance of the region 	<ul style="list-style-type: none"> -Cultural route -Providing information, distributing leaflets and developing an information centre -Themed niche products
Italy		<ul style="list-style-type: none"> -Stimulate co-operation between public sector and private sector -Integrated regional development -Developing quality tourism -Promotion of cultural routes at national and international level 	Promotion of cultural routes through: Internet portal Publications Seminars
Japan (Yamagata Prefecture)	<ul style="list-style-type: none"> -Desire to promote Japanese culture to foreigners -Low level of foreign tourism 	<ul style="list-style-type: none"> -Help make Japan tourism-oriented -Encourage tourists to come to Japan on both first-time and repeat visits -Spread tourism to new regions -Create international understanding of Japanese culture 	Developing cultural experiences for foreign visitors

Table 3.1. Issues, aims and activities of OECD case study projects (*continued*)

COUNTRY	ISSUES	AIM	ACTIVITIES
Korea	<ul style="list-style-type: none"> -Need to enhance attractiveness and competitiveness of local territories as cultural tourism resources -Lack of understanding of Korean culture -Lack of thematic products 	Product differentiation to enhance attractiveness and competitiveness	Temple stay – national network of temple accommodation
Mexico (Michoacán)	<ul style="list-style-type: none"> -Need to enhance the rich cultural heritage of the region -Strong migration of young people and working age population to the U.S. 	<ul style="list-style-type: none"> -Develop new cultural products and cultural experiences -Encourage direct contact between local population and tourists -Involve artisans in developing creative tourism 	<ul style="list-style-type: none"> -Production of a map of cultural tourism resources -Development of urban plans to integrate tourism and culture -Restoration of cultural heritage -Provision of basic and tourism infrastructure -Development of cultural events
Poland (Silesia)	<ul style="list-style-type: none"> -Heritage preservation -Regeneration of former industrial sites 	<ul style="list-style-type: none"> -Display the richness of the economic and cultural heritage of the region -Preserve industrial heritage -Generate a new image of the region -Display technological monuments as unique nationally and internationally 	<ul style="list-style-type: none"> -Provision of signage to mark cultural route -Marketing and promotion of the route -Encouraging tour operators and travel agencies to sell the product

Table 3.1. Issues, aims and activities of OECD case study projects (*continued*)

COUNTRY	ISSUES	AIM	ACTIVITIES
		<ul style="list-style-type: none"> -Restructure industrial facilities into resources for services, trade and business -Encourage investment and fight unemployment 	
Poland (Matopolska Region)	<ul style="list-style-type: none"> -Decline in economic activities and increase in unemployment -Aging population 	<ul style="list-style-type: none"> Preservation of wooden architecture, traditions, customs and regional art 	<ul style="list-style-type: none"> Development of a cultural route
Portugal (Alentejo)	<ul style="list-style-type: none"> -Lack of regional identity -Uneven development -Unemployment 	<ul style="list-style-type: none"> -Sustainable endogenous and tourism development -Networking between rural communities 	<ul style="list-style-type: none"> -Developing authentic experiences of village life, creation of a brand -Networking with other villages in Portugal and Europe
Romania (Oltenia)	<ul style="list-style-type: none"> -Need to create a well-defined identity of the place -Insufficient development of cultural tourism compared to potential of the area 	<ul style="list-style-type: none"> -Creation of an efficient marketing policy for cultural tourism at regional level -Establish a nationally and internationally recognised regional identity 	<ul style="list-style-type: none"> -Developing regional identity through: <ul style="list-style-type: none"> -Evaluation of existing markets -Analysing the tourist destination from a tourism marketing perspective -Establishing strategic goals

Table 3.1. Issues, aims and activities of OECD case study projects (*continued*)

COUNTRY	ISSUES	AIM	ACTIVITIES
Slovakia (Trenčín Region)	-High unemployment -Poor accessibility	Increase the use of cultural facilities to reinforce the image and identity of the region	-Develop regional brand -Develop regional tour circuits
Slovakia (Žilina Region)	Need to finance culture		-Organising of joint fairs with cross- border regions -Presentation of geographic and tourist information on the Internet -Establishment of new cross-country skiing and cycle routes
Turkey (Çorum Province)	-Heritage preservation -Increase tourism's socio-economic contribution to the destination	-Improve infrastructure -Promote the destination's cultural assets -Transform destination into a tourism attraction site	-Restoration and archaeological excavations -Infrastructure improvement, particularly roads -Promotion of local cuisine -Converting local crafts into touristic products -Training

The review of the OECD case studies indicates that the main drivers for developing culture and tourism policies are:

- Enhancing and preserving heritage.
- Economic development and employment.
- Physical and economic regeneration.
- Strengthening and/or diversifying tourism.
- Retaining population.
- Developing cultural understanding.

For many regions there is also a problem of physical accessibility. Even when a region has considerable potential to develop cultural assets for tourism, if these are not easily accessible to tourists these assets would be difficult to integrate into the tourism product. For this reason, many of the case study regions emphasised infrastructure development as a priority.

Many of the OECD case studies relate to predominantly rural areas or former industrial regions undergoing restructuring, rather than metropolitan or major urban areas. Although all these different types of regions are involved in the same competitive race to make themselves attractive and to draw in investment, they have different capabilities and therefore strategic options in the development of culture and tourism (Box 3.1). In their review of *City Tourism and Culture* (2004) LaGroup and Interarts underline the differences between major metropolitan centres, smaller cities and villages in terms of development options. Whereas large cities can use creative assets as means to develop “atmosphere” and difference as prescribed by Florida, for example, smaller destinations are more reliant on heritage. For major cities, the issue of “image” may also be more important than in other places.

In all regions, however, it is increasingly the case that culture and tourism policy are related to generating externalities which will benefit the local economy.

Box 3.1. Vorarlberg Region, Austria: Boosting cultural attractiveness

Located in Western Austria, the Vorarlberg Region lies on Lake Constance, with borders to Germany, Switzerland and Liechtenstein. Tourism and leisure are extremely important for the region's economy, accounting for 15% of the GDP. It has a dynamic culture and arts scene as well as a mixture of traditional and modern architecture and important festivals and cultural institutions. Their cultural tourism strategy aims to position Vorarlberg in international markets and develop a regional brand. Culture will play an important part in differentiating the regional product and in underpinning the regional brand. Targets for 2010 include:

- To make Vorarlberg the most attractive cultural tourism destination in the region.
- To ensure that Vorarlberg has the most dynamic and renowned cultural scene in the region.
- To develop co-operation between the cultural and tourism sectors.

Policy aims

The main objectives of the culture and tourism programmes examined here are related to improving the economic, cultural and social position of the target regions. In most cases, relatively general goals are set, usually in terms of increasing tourist numbers, or attracting particular types of tourists (Table 3.1).

The main policy areas which can be identified from the case studies are:

- Infrastructure improvement.
- Heritage preservation.
- Enhancement of economic performance.
- Development of regional identity and enhancement of region image.
- Spread of tourism to new areas.
- Improvement of the quality of tourism and tourism facilities.

Culture and tourism are both seen as important drivers for the regional economy which also have a number of other desirable effects. Tourism has long been seen as a means of providing employment, particularly in areas where few alternatives exist. At the same time, developing tourism related to

culture aims to provide income to support cultural facilities, and by consuming regional culture tourists are presumed to become more aware of regional distinctiveness. Culturally-interested tourists are also assumed to visit destinations where other tourists do not usually go, helping to spread tourism to new areas and combating seasonality. The boost given to local culture also stimulates the local population to value and preserve their culture as well as giving them renewed pride in the locality. This is one of the factors causing a number of administrations to develop programmes which enhance the cultural awareness and interest in heritage preservation among the local population. The development of schemes involving the local population is a feature of many cultural tourism programmes, including those in Japan (Box 3.2), Mexico (Box 3.3) and Korea (Box 3.18).

Box 3.2. Japan: Creating cultural understanding

The aim of the Japanese Cultural Tourism Programme is “to encourage more tourists to come to Japan on both first time and repeat visits, it is important to provide interesting, easy-to-follow information and experience to stimulate deep interest in Japanese history and traditional culture.” In order to achieve this, it is important to link culture and tourism: “until now, there have been virtually no systems in place to enable tourists to deeply experience the history and culture of a given location.” The Japanese Cultural Tourism Commission has therefore held workshops with a view to “facilitating a deeper understanding on the part of Japanese people of their own history and culture, and at the same time to identify and utilise cultural tourist resources from the perspective of foreign tourists, and to provide a cultural tourism experience for large numbers of tourists that answers to their interests.”

All of these advantages make cultural tourism a “good” form of tourism which is often contrasted with other tourism products, particularly “sun and sand” tourism. Cultural tourists are seen as high spending tourists with a genuine interest in the culture of the destinations they visit, which helps to make this form of tourism more sustainable.

At the same time, developing cultural products for tourism also requires a diverse range of actors to work together effectively. Not only is culture very diverse, but the different policy contexts within which cultural and tourism actors operate tend to complicate matters. In terms of policy implementation, therefore, the emphasis is very often on getting the tourism and cultural sectors to work together.

Implementation

Structures

Government clearly has an important role in the relationship between tourism and culture. As well as being responsible for tourism policy, government is responsible for cultural policy and the conservation of cultural heritage. As the scope of cultural policy widens to include more aspects of intangible culture, so government increasingly needs to work with the commercial and voluntary sectors to act effectively in the cultural field.

The case study examples of cultural route development (Boxes 3.7, 3.8 and 3.9) underline the importance of co-operation between the tourism and cultural sectors, as well as different levels of government and the private sector. The importance of major attractions as “nodes” within these routes which attract large numbers of visitors is also clear. This principle is being used in Greece to spread tourists to places which currently lack tourism development, using major cultural sites as anchor points from which to spread tourists further into inland areas of the Peloponnese. In Mexico, cultural tourism is also a means of diversifying the tourism product (Box 3.3).

Box 3.3. Michoacán, Mexico: Diversifying into intangible culture

The State of Michoacán is using its rich cultural and natural heritage, including archaeological sites, Hispanic architecture, cathedrals and villages, as well as local celebrations, festivals and customs to diversify the cultural offer for tourists. The development of tourism in the region has been undertaken as a joint effort between the government and civil society. For example the “adopt a work of art” programme is run by a local association which has restored numerous sites and monuments. In the three *pueblos mágicos* (Pátzcuaro, Tlalpujahua and Cuitzeo) there have been large investments in renovating the urban fabric and creating new marketplaces. The private sector has also invested in finding new uses for historic buildings as hotels, restaurants and shops.

This means that public-private partnership is becoming increasingly important in the relationship between tourism and culture. Bringing tourism and culture together inevitably involves working with a wide range of stakeholders and creating effective partnerships to develop and market the resulting products. All of the OECD case studies underline the important role played by different forms of partnership in achieving project aims.

Partnerships usually involve both public and private sector partners, which may work together in different ways, as the Korean Ministry of Culture, Sports and Tourism points out:

- The first major category (of partnership) consists of joint ventures in which a public sector plays the dominant role in developing new cultural tourism facilities.
- The second type of partnership is that in which the public sector engages in pump-priming to facilitate new cultural tourism development.
- The third category comprises situations where the public sector uses existing cultural resources owned exclusively by the private organisation. The public sector's contribution either entices the private sector to make their cultural resources available for public use, or improves the prospects of such facilities being attractive.

These three categories may be conceptualised as being on a continuum reflecting the magnitude of a public sector's cultural resource commitment and involvement; this increases if the public agency assists a development of cultural resources through pump-priming; and is maximised in joint developments with the private organisations.

Key benefits commonly derived from the public-private partnership are:

- Reduced antagonism between the public and private sectors.
- More effective use of resources (money and time).
- Prevention of duplication.
- Combined areas of expertise.
- Increase in funding potential.
- Creation of a “win-win” situation.

In many cases the need to involve many different actors in tourism and cultural development means that regions form partnerships or co-operation networks to involve all stakeholders in development processes (Box 3.4).

Box 3.4. Turkey: Public-private partnership in Hittite tourism

The Çorum region in Turkey, former centre of the Hittite civilisation, is now being used to attract tourists. The region includes many important archaeological remains (including Hattuša, a UNESCO World Heritage site), the majority dating from the 13th century B.C. In spite of the richness of the cultural heritage in the region, tourism development is hampered by lack of accessibility to the major sites of the Hittite civilisation and by a lack of tourist accommodation.

The region was the subject of a Tourism Development Workshop (TDW) organised by the Ministry of Culture and Tourism with participation from government ministries, local authorities, entrepreneurs, universities and NGOs. Businesses in Çorum have invested in the development of a five-star hotel designed to upgrade the tourism facilities in the region.

Partnership networks can also be formed on a larger scale, for example, involving inter-regional collaboration across a number of countries (Box 3.16). This type of collaboration has been enhanced in recent years through EU funding programmes, many of which provide opportunities to link tourism and culture. In France, more thought is also being given to developing partnerships between metropolitan regions and their hinterlands (Box 3.5).

Box 3.5. France: Linking the culture of the metropolis and surrounding regions

A recent study of metropolitan regions in France indicated that they are often at a disadvantage compared with large cities in other European countries. One reason for this is the relative lack of cultural products oriented towards current tourist needs. As well as strengthening the supply of attractions and events in the city, the report argues, there should also be better links between cities and their surrounding regions. Such links can be mutually beneficial, as the metropolis can generate a supply of tourists while the surrounding regions add to the attractiveness of the city as a destination. The idea is to strengthen the “hub” or “gateway” function of the metropolitan centres of France in order to strengthen urban and regional cultural tourism.

Funding and investment

Much of the core funding for cultural tourism programmes comes from the public sector, even though most subsidiary funding is provided by the private sector (*e.g.* development of tourist services such as transport, accommodation and catering). Because culture is usually seen as an area of public consumption (as opposed to tourism, which is seen as a productive sector), the cultural elements of such programmes often depend on the

public sector. One barrier to developing privately-funded programmes, or even mixed-funding models, is the relatively low rate of transfer of resources between the tourism sector and the cultural sector. As noted earlier, for example, the proportion of tourist spending that accrues to cultural institutions through entry charges or commercial activities such as catering or merchandising, is in general small. For most cultural institutions, therefore, tourism is an additional funding stream rather than a main source of income.

Public funding has a number of limitations, and for many cultural institutions it limits what activities they can undertake and often makes them dependent on a public sector funding cycle which creates regular uncertainty about funding levels. A number of administrations are now trying to alleviate these problems by encouraging cultural institutions to develop other funding sources and by introducing multi-annual funding programmes. This is the case of the Port Arthur Historic Site in Australia, for example (Box 3.6).

Box 3.6. Australia: A long-term funding programme for Port Arthur Historic Site

Central to the success of the development of the site has been the implementation of an ongoing program of recurrent (five-year) funding. Port Arthur has to date received AUD 14 million (EUR 8.2 million, USD 12.8 million) over seven years from the Tasmanian government, commencing in the financial year 2000-01, specifically for conservation and interpretation work plans as set out in the site's conservation plan.

This funding mechanism allows the site to manage tourism services from tourism revenue while at the same time preserving the site by funding for archaeology, conservation and interpretation projects. Consequently, the [site's managers have] been able to extend the location's attractiveness for visitors, residents and investors and increase its competitiveness.

In many regions of Europe, EU funding has also played an important role in recent years in boosting the supply of cultural facilities for tourist use. Many different funding programmes support cultural tourism projects, because stimulating travel to cultural sites across Europe helps the EU to underpin the concept of "unity in diversity". By learning more about each others' culture, Europeans can arguably appreciate how much they have in common as well as the cultural diversity which characterises most of Europe.

Private investment has also been crucial in all of the regions studied. While the public sector may be able to develop key attractions or undertake

destination marketing, it is the private sector that supplies the bulk of the tourism product. In many cases there is a direct link between public and private sector investment, as government support for cultural or tourism development will stimulate the private sector to invest as well. This is clear in the Mexican case (Box 3.3), where public sector initiatives helped to leverage a threefold increase in private sector investment. This multiplier effect is also evident in the cases of Glasgow (Box 2.4) and Barcelona (Box 3.19).

Product development

The OECD case studies cover a wide range of product development initiatives (Table 3.1). The main types of activities identified in the OECD case studies can be summarised as:

- Planning
- Market analysis
- Restoration
- Tourism product development
- Marketing and promotion

These main activities are discussed in more detail in the following sections.

Planning and market analysis

Planning the development of culture and tourism involves statutory planning authorities and procedures, but to be effective it should also involve a wide range of stakeholders and co-ordinate the activities of different levels of administration.

For example, the Vorarlberg development plan in Austria forms part of a national cultural tourism plan: Culture Tour Austria. This programme, initiated by the tourism department of the Federal Ministry of Economics and Labour, is designed to develop a strategy for the future “Kulturtourismus Austria 2010+” which will focus on Austrian cultural tourism in the years ahead. The planning process involved a thorough analysis of the current situation of Austrian cultural tourism as well as opportunities and threats in the future. In addition to organisational

innovations, the key launch projects include preparation of a premium product catalogue for leading brands in the Austrian cultural tourism field, brand and quality management tailored to the needs of cultural tourism, and future-oriented cultural and quality marketing co-operation. The marketing co-operation “Creative Austria”, is being funded by major Austrian culture and tourism organisations and has assumed important marketing tasks in cultural tourism.

Box 3.7. Poland: Cultural route development in Silesia

The Silesia region of southern Poland has an important industrial heritage as well as a wealth of natural and cultural attractions. The region is now developing an “Industrial Monuments Route of the Silesian Region” which is designed to link the region’s major attractions and highlight the local uniqueness of the region. The creation of a cultural route in the area aims to underline the unique nature of the region as well as linking its most important cultural assets, including working machinery in the historic machine park, through open-air museums or museums of industry and technology to railway stations, housing estates or workers’ settlements. The cultural route:

- Presents what is outstanding in the region.
- Identifies the region and characterises it through its traditions, customs, daily activities and sites.
- Reflects the traditional culture of the region and gives the visitors an opportunity to use it.
- Is based on the regional products and services which are easy to identify and distinguish.
- Comprises not only the tradition and past of the region but also its contemporary image, transformation and character.
- Allows for the creation of the desired image of the region.

This type of centralised, structured planning for cultural tourism is rare, but it indicates the way in which a wide range of partners from the public and private sectors can be involved in the development of policy and its subsequent implementation.

Cultural tourism product development

The OECD case studies indicate that regional cultural tourism products are usually developed to create a focus for collaboration between the tourism and cultural sectors, to improve the image of the region or to spread tourists across the region. The main strategies that have been utilised for

these ends are the creation of cultural routes, creation of themed products and cultural events.

In many cases, regions have linked a number of attractions together to form cultural routes or itineraries. A cultural route is “a themed route that has a cultural value or an element of cultural heritage as its focus and that assigns a key role to cultural attractions” (Puczkó and Ratz, 2007). Such routes have the advantage of acting as a focus for cultural and tourism activities in a particular region as well as leading tourists to specific areas in the region. The Greek case study features a cultural route which is specifically designed to divert tourists from traditional beach resorts and to attract them to the inland areas of the Peloponnese (Box 3.9). Cultural routes can cover a wide variety of different cultural themes and can act at a variety of scales from local to international. They may be based on pre-existing route ways (such as the pilgrimage trail to Santiago de Compostella in Spain) or created specifically for cultural tourism. This flexibility makes them very popular as a tourism product development option for regions around the world, as the OECD case studies indicate.

Box 3.8. Italy: Developing cultural routes through partnership

In Italy, three European cultural routes have been developed in partnership with other European countries and institutions. The Via Francigena (www.viafrancigena.eu), the Phoenician Route (www.rottaidefenici.it) and the Via Carolingia (www.viacarolingia.it) have been developed by tourism authorities in partnership with local and regional administrations in Italy and other countries along the routes and the European Institute of Cultural Routes. These itineraries allow visitors to rediscover important aspects of European and Italian heritage, and the flows along the routes help to stimulate intercultural dialogue and exchange.

The theming associated with cultural routes may also be applied to individual sites or clusters of attractions as well (Box 3.9). In a globalising world, it is increasingly important to develop stories or narratives that can connect people to local cultures. It is not enough to have culture, it should also be made accessible to locals and visitors alike through appropriate themes and narratives. Many visitors may not be familiar with the cultures they are visiting, and themes effectively act as a shorthand which enables the outsider to interpret a new culture more quickly, although arguably on a more superficial level. The development of the Labours of Hercules theme in Greece is a good example of how this can work. Most people will be familiar with the story of Hercules, and therefore have a connection with places which otherwise would mean nothing to them.

Box 3.9. Greece: Spreading tourists through cultural routes

In spite of the cultural richness of the area, the Peloponnese is not visited by many tourists, and there is a need to spread tourism to inland areas. The “Pausanias’ Pathways” are aimed at creating an attractive setting for residents, investors and visitors, as well as enhancing the economic, environmental and social performance of the region. The main product being developed is a thematic route from Corinth to Olympus. The programme targets mainly visitors to Ancient Olympia and Corinth, offering them a more authentic experience of the inland of the peninsula.

The route contains a number of niche products, such as a programme based on the Labours of Hercules. This route connects locations where a mythical labour took place and a different activity will be organised and promoted to tourists. A Travel and Immigration Museum is also being developed and a train route from Corinth to Kalamata will increase accessibility to the region.

In many cases the theming of destinations is also linked to specific cultural events, such as celebrations of anniversaries connected to famous places, people or events. In the Netherlands, for example, the National Tourist Office has developed a system of theme years based around famous artists such as Van Gogh and Rembrandt or themed events such as the Floriade exhibition. The Rembrandt 400 theme year in 2006 attracted 1.7 million visitors (including 1 million foreign tourists) who spent a total of EUR 623 million (USD 967 million). Cities and regions are also increasingly involved in competition to attract “footloose” events, such as the European Capital of Culture (and equivalent events in Canada, Russia and Latin America) (Box 3.10).

Events can also be a useful catalyst for economic recovery. For example, in Louisiana (U.S.) a post-Hurricane Katrina “Main-to-Main” initiative was developed, which is a moving festival that promotes Main Street arts, crafts, and other cultural attractions. This innovative programme was taken to 25 towns in the region, and it targets job growth by assisting neighborhood-based organisations with the revitalisation of traditional neighborhood business districts.

Box 3.10. Luxembourg and Greater Region: Linking regions through a cultural event

In the past, the European Capital of Culture (ECOC) event has been hosted by cities, but since 2007 the European Union has encouraged a regional dimension in the event. In 2007, the ECOC was hosted by “Luxembourg and Greater Region”, covering five different regions of Luxembourg, Belgium, France and Germany. Of more than 500 projects organised during 2007, 130 were cross-border events involving two or more regions. The year-long event generated more than 3.3 million visits, spread across the whole region. In Luxembourg there was a 6% growth in hotel occupancy, while the event injected over EUR 56 million (USD 44 million) of visitor expenditure into the local economy.

Source: www.luxembourg2007.org

An increasingly important issue in product development is the involvement of the local community. As research on cultural consumption by tourists has consistently shown that involvement with local communities is important as a motivating factor and as a major source of visitor satisfaction, the collaboration of local communities is increasingly a prerequisite to product development. Local communities are not just the hosts for tourism, but also a cultural attraction in themselves, helping to define the sense of place and atmosphere of regions. In a number of the case studies covered by this book, the support of the local community has proven essential to developing cultural experiences for tourists. This support cannot be taken for granted, but rather has to be nurtured and developed in consultation with the community. In many regions this can present considerable challenges because of the linguistic and cultural distance between the tourists and the communities they visit. This also underlines the need for appropriate mediation systems to be developed.

Marketing

One of the most important ways in which public authorities can assist in the development of culture and tourism products is through marketing activities. Because of the complexity of the cultural product, very often there is a need to create marketing consortia and give regional products exposure in national and international markets.

National Tourism Administrations are developing a wide range of marketing activities related to culture and tourism, including:

- Branding and image development.

Box 3.11. Peru: Young travellers and culture

Cultural tourism is extremely important in Latin America. For example, Peru classifies 93% of its inbound tourists as cultural tourists. In addition to the standard cultural tourism target groups of older, richer tourists, Peru has also targeted younger travellers who spend less per day, but stay longer in the country and see more of its culture. Young travellers receive discounts with their International Student Identity Card on the famous Inca Trail and with the youth travel organisation INTEJ. Young volunteer tourists are also being attracted to spend long periods in the region helping with social and cultural projects. Latin America accounted for over a third of all volunteer placements worldwide in 2007. There are now a large number of local receiving organisations running volunteer projects related to culture, as well as organisations bringing in volunteers from abroad. For example, Paititi Peru is a private organisation that specialises in local and cultural tourism throughout Peru. Profits from the tourism expeditions are reinvested in local communities.

Sources: Richards (2006, 2008) and Tourism Research and Marketing (2008)

- Internet platforms, including accommodation and event booking functionality.
- Joint promotions with tour operators.
- Themed products (events, attractions, cultural routes).
- Theme years and events.
- Cultural and creative clusters.
- Encouraging filming in the region.
- Discount cards.

In particular, the Internet has become an almost universal marketing tool in recent years. Research by ATLAS shows that over half the foreign tourists visiting cultural attractions in Europe and Asia in 2007 used the Internet to find information on the cultural site they were visiting. For those on a cultural holiday, this figure increased to over 60%. The creation of Internet platforms which provide information on cultural attractions and events is therefore extremely important, particularly in reaching international markets. There is a growing number of Internet sites which offer the possibility for tourists to package cultural sites and events with accommodation and travel (Box 3.12).

Box 3.12. U.S.: Prototype of dynamic packaging of cultural and heritage tourism

The U.S. Cultural and Heritage Tourism Marketing Council is a travel trade association dedicated to marketing and promoting cultural and heritage tourism to and within the U.S. The council is developing “dynamic” cultural tourism packages that offer unique and innovative experiences to visitors to and within the U.S. A prototype of these packages has just been developed in partnership with the California Travel and Tourism Commission and Shop America Alliance. Packaged under the acronyms of HATS (History, Arts, Theatre, Shopping), BAGS (Botanical Arts, Gardens, Shopping) and EATS (Epicurean Arts, Tours, Shopping), these 36 initial packages include over 100 cultural and tourism destinations (www.culturetoursandmore.com).

Source: U.S. Cultural and Heritage Tourism Marketing Council

Regions are creating specific marketing alliances to showcase cultural tourism opportunities, and in some cases different regions are beginning to work together to attract cultural tourists (Box 3.13). The Arts Cities of Europe programme features 38 cities and offers tours, packages and entry tickets to major art exhibitions.

One of the problems in marketing culture to tourists is that destinations often try and market their culture in general, offering a wide range of products, when many “cultural tourists” are interested in much more specific experiences. The Korean OECD case study notes:

“One of the biggest mistakes that inexperienced managers related to Temple Stay programmes make is to assume that the Temple Stay programme or experience has universal appeal. Because of this misguided belief, managers related to the Temple Stay embark on a series of unfocused promotional activities that send out unclear messages aimed at no one in particular.”

Even where target groups are identified, they tend to be fairly general as the Romanian case study (Box 3.14) indicates the following target groups:

- Persons with above average level of education.
- Persons with above average financial capability.
- Targeted age: 40-65 years.
- A large share, but not a dominant one, being families with children.
- People who can afford longer holidays than the average for the region (approximately two days).

Box 3.13. Holland: Problems in regional packaging

It is not clear if linking places within regions is always a successful strategy. In the Netherlands, five cities, Haarlem, Leiden, Delft, Dordrecht and Schiedam, were linked in the promotion around the theme of historic towns (*het geheim van Holland*/the secret of Holland). After four years, the project was stopped due to disappointing results. The cultural tourists who visited the towns visited only one or at the most two towns and not most of or all of the towns included in the promotion. Because of the perceived resemblance between the towns it was not interesting enough for tourists to visit more than one or two of the towns. Interestingly one of the towns that participated in the initial project, namely Delft, has subsequently linked their promotion with Rotterdam. The town has chosen the strategy to link itself with a city nearby, but with a totally different cultural product and size, instead of linking itself to towns with a similar product and of a similar size.

Source: European Travel Commission (2005)

There is a need to identify more specific niche markets which have an interest in specific products in the region. As the competition to attract cultural tourist increases, it is vital to give people a specific reason to visit a destination which relates to their interests. In many cases this involves identifying niche products that can be sold to specific target segments (Box 3.15).

Box 3.14. Romania: Marketing partnerships in the Oltenia region

Oltenia is one of the richest historical regions in Romania, with more than 500 religious monuments, and it is the birth place of the sculptor Constantin Brancusi. The main aim of cultural tourism policy is better marketing, in order to establish a nationally and internationally recognised regional identity. To achieve this, a public-private partnership has been created in the association “*Oltenia de sub munte*”. A website has been created (www.eco-oltenia.ro) which features the cultural products offered by the region and information on transportation, accommodation and local gastronomy.

As the creative tourism example shows, the links with local people are extremely important for the development of engaging experiences and the creation of “atmosphere”. This is also the basic principle used in a number of projects reviewed, particularly in the case of Portugal (Box 3.16).

Box 3.15. New Zealand: Developing creative tourism

Creative Tourism New Zealand (www.creativetourism.co.nz) is one of the pioneers of “creative tourism”, a new form of cultural experience which enables visitors to participate in creative activities which are characteristic of the region being visited. The creative tourism concept is based on the idea that people want more engaging and active experiences than those offered by traditional forms of cultural tourism. The emphasis is therefore on learning and doing, and sharing skills with local people. Creative Tourism New Zealand was launched in 2004 with a group of 20 tutors running workshops on subjects ranging from basket making to Maori bone carving. The concept has proved popular with tutors and workshop participants, and the number of both has increased over the past few years.

The target market for Creative Tourism New Zealand is the “Interactive Traveller” (IT) segment identified by Tourism New Zealand. These visitors are: cultural “omnivores” who seek out new experiences that involve interaction with nature, social and cultural environments and have high disposable incomes. Research has indicated that the IT segment is growing faster than tourism in general (9% a year) and is spreading tourism expenditure to new regions.

Source: Richards and Wilson (2006)

Box 3.16. Portugal: Developing “Genuineland”

In the Alentejo region of Portugal, the European Network of Villages is working to develop the concepts of “Village Tourism” and “Tourism of the Imagination”. A “Genuineland” brand has also been created to enhance the distinctive image of the project, which involves local communities in activities such as recreating historical events, developing excursions, organising the tourism offer and joint activities and exchanges with the other villages. The project has also developed promotional and professional training activities, and it has created promotional support for the villages (website, printed materials) helping the villages to offer an authentic tourism experience based on genuine local culture.

Results and evaluation

Effects of policies and programmes

Monitoring the effects of cultural and tourism policy is becoming an increasingly important issue for destinations that need to demonstrate that they are implementing their policies effectively and to guide future policy making. In most cases, however, policy evaluations take place for tourism or culture in general, rather than for specific “cultural tourism” initiatives.

Some of the OECD case studies do provide indicators of outcomes, particularly in terms of visitor numbers and economic impact.

In Mexico, the number of tourists to the Michoacán region has grown from 3.4 million in 2002 to over 7 million in 2007, of which 32% were motivated by culture. The number of international tourists has also grown dramatically over the same period, from 104 000 to 1.1 million. Length of stay and expenditure per day have also grown, pushing the total economic impact from USD 271 million in 2002 to USD 1 276 million in 2007. The contribution of tourism to GDP has risen to almost 9%, well above the national average, and over 40 000 new jobs have been created. Between 2002 and 2007, annual investment in tourism also more than tripled, and significant increases were registered in the supply of hotels and number of available rooms. In spite of growing hotel supply, average room occupancy during this period increased from 44% to 67%.

In Silesia in Poland, the results of the project indicate that cultural routes can help to stimulate cultural tourism, and, in particular, to attract foreign visitors (Table 3.2). For example, the Tychy Brewing Museum attracted 36 000 visitors in 2007, including 5 400 foreign tourists (15%). The newly-opened Brewery Museum in Żywiec had 103 000 visitors in the period from September 2006 to February 2008, a very high visitor total for this type of facility. The industrial heritage related to mining also showed an increase in tourist numbers after development of the route. The number of foreign tourists has also increased over the same period. In the Silver Mine, the number of foreign visitors increased by 18.72% between 2006 and 2007.

Table 3.2. Visitors to Silesia, Poland

YEAR	HISTORIC SILVER MINE	BLACK TROUT DRIFT MINE	“QUEEN LUIZA” COAL MINING OPEN-AIR MUSEUM IN ZABRZE
2004	67 636	40 880	9 510
2006	66 812	41 212	
2007	75 327	44 200	16 753

In Romania, annual programme evaluations revealed a small growth in the number of tourism associations and accommodation providers in the region, a growth of traditional craftsmen (potters) from just a handful of people to over 70 in 2007 and a 10 % increase in tourist numbers.

In Australia, visitor numbers to the Port Arthur Historic Site have grown significantly since the funding programme commenced in 2000. An economic assessment of Port Arthur’s state-wide contribution indicates that there has been a 52 % increase in Gross State Product (GSP) from

AUD 16.454 million in 1999 to AUD 25.098 million (EUR 14.6 million, USD 23 million) in 2003 and, in employment terms, an increase of 57% in full time equivalent (FTE) employees from 182 to 286 for the same period.

In Austria, the region of Vorarlberg has seen a considerable increase in visitors to cultural institutions and events over the past two decades. For example visits to the Bregenzer Festspiele event grew from 126 000 in 1987 to almost 200 000 in 2007. In 1997 the special edition of the festival organised to celebrate the 200th anniversary of the composer Franz Schubert attracted a record total of 211 000 visits, underlining the added value of narratives attached to iconic figures. The number of visits to the Schubertiade also grew from less than 10 000 in 1985 to over 40 000 in 2007.

In Italy, the popularity of cultural routes among consumers is indicated by the volume of visits to cultural sites integrated into the itineraries. Sites along the Phoenician Route attract more than 2 million visitors a year. Physical visitors are also matched by virtual ones: the Internet site www.viafrancigena.eu attracted 55 144 unique visitors in April 2008 alone.

Many destinations have now started to develop more structured monitoring programmes which can help to identify the effects of specific marketing programmes. In the U.S., for example, many states use visitor surveys to estimate the economic impacts of cultural tourism programmes (Box 3.17).

Box 3.17. Colorado: Evaluating heritage tourism

According to Longwoods International's 2003 Colorado Visitor Study, there were 21.3 million overnight pleasure trips to Colorado that year. Approximately 5.1 million trips (24%) included a visit to at least one historic area – for example, visitors who visited the Healy House Museum and Dexter Cabin in Leadville, explored the Ancestral Pueblo culture's cliff dwelling at Mesa Verde National Park, rode the Georgetown Loop historic railroad, or took a tour of the Molly Brown House in Denver.

The estimated USD 1.5 billion in direct expenditures by heritage tourists in 2003 generated an additional USD 1.9 billion in indirect economic impacts, for a total impact of USD 3.4 billion. The spending by heritage travelers also generated an estimated USD 1.1 billion in total earnings by Colorado workers and 60 964 jobs.

Source: Colorado Visitor Study

In Korea, the promotion of spiritual heritage is not only generating visitor and expenditure effects, but increasing cross-cultural communication as well (Box 3.18).

Capacity of tourism and culture as drivers of attractiveness and competitiveness

Tourism and culture have the potential to act as drivers of attractiveness, provided there is co-operation between the two sectors. In addition, the most successful regions are those which recognise the wider implications of the relationship, particularly in the areas of attracting new residents and inward investment. At present these issues are rarely considered in programmes of cultural and tourism development, because these sectors are individually associated with narrow sectoral development. However, there is growing evidence that culture and tourism may act as a powerful combination to attract people and investment.

Box 3.18. Korea: Generating material benefits from spiritual tourism

A survey of 360 foreign participants in the Temple Stay programme indicated that the main motivations were “experiencing Korean traditional culture (Buddhism)” (55.8% of participants), “interest in Buddhism” (21.1%), and “desire for having an opportunity for self-reflection” (5.8%). The main benefit that participants gained from their stay was “new cultural experience (Buddhism)” (54.2%). More than 79% of respondents agreed that the Temple Stay has high potential to be developed as a cultural tourism resource.

In the first year of its operation less than 1 000 foreigners participated in the programme, compared with 2 000 in the first seven months of 2007 alone. In total, the 72 participating temples hosted over 69 000 visitors in 2007. The government has supported this programme through the Tourism Development Fund. In 2007, more than KRW 1.5 billion (EUR 964 000, USD 1.5 million) were provided to promote the Temple Stay programme, including the development of temple infrastructure (such as accommodation facilities, roads, toilets, etc.), publication of promotional materials such as guide books, videos, magazines, familiarisation tours and training programmes. The Korean government will also invest more than KRW 248.9 billion (EUR 159 million, USD 251 million) in the Temple Stay programme over ten years for developing cultural tourism products as a resource in Korea.

The evidence from the case studies presented here indicates that the main factors linking tourism and culture to competitiveness and attractiveness include:

- Ability of culture to provide distinctiveness.
- Ability of tourism to support tangible and intangible culture.
- Role played by regional stakeholders.
- Leadership qualities of public sector stakeholders.
- Administrative arrangements for tourism and culture.

The most successful cultural and tourism regions seem to be those that manage to lead inclusive groups of stakeholders from both public and private sectors in developing and marketing a wide range of cultural and creative resources for tourism. These resources also tend to be developed in such a way that they add to, rather than diminish, regional distinctiveness and underline the authentic culture and creative expressions of the region. Successful policies are also those which take a wide approach to culture and tourism, seeing them as factors which can boost the attractiveness of destinations not just to visit, but also as destinations to live, work and invest in. The case study of Barcelona (Box 3.19) is particularly instructive in this respect, particularly as the development of cultural tourism arguably stemmed from a cultural, rather than a tourism imperative (Dodd, 1999).

In terms of the “visit-live-work-invest” aims of much regional policy, it is important to point out the role of migration in forging cultural and economic links between distant destinations. The presence of a diaspora abroad can generate considerable flows of visitors with a specific cultural interest in a region. These visitors may also be more likely than others to live for a while or study in the region, open a business or make other investments (attracting such visitors is one of the functions of the immigration museum being developed in the Peloponnese in Greece – Box 3.9).

Box 3.19. Barcelona: A place to live, work, invest and visit

In common with many other regions, the metropolitan region of Barcelona in Spain is developing policies which position the region as a place not only to visit, but also to live, work and invest. The realisation that these different functions of the city are intertwined is also evident from the residents and visitors themselves.

Visit

Tourism to Barcelona has increased dramatically since the city hosted the 1992 Olympic Games. The number of overnight stays has grown from 3.7 million in 1990 to 13.6 million in 2007. Much of the growth has come from cultural tourism, with the number of visits to the Sagrada Familia increasing from 1.4 million in 2000 to 2.5 million in 2006 and the Fundació Joan Miró doubling its visitors to almost a million over the same period. Tourists give an overall evaluation of the quality of their visit of 8.2 out of 10.

Box 3.19. Barcelona: A place to live, work, invest and visit (continued)

Live

For the ninth consecutive year, the 2006 European Cities Monitor considered Barcelona to be the European city offering the best quality of life for workers. Benchmarking in European Service of Public Transport scored Barcelona highest in overall satisfaction with public transport (83%). Tourists also feel that Barcelona is an attractive place to live – almost 50% of visitors interviewed in Barcelona in 2004 agreed that they could imagine living in the city. Resident surveys also show that they feel tourism makes an important contribution to supporting culture. In 2006, 81% of Barcelona residents agreed that tourism helps to support the cultural institutions in the city.

Work

The economically active population of Barcelona increased from 68.8% in 1997 to 74.2% in 2003, well above the Spanish national average (69%). The level of unemployment fell from 21.6% in 1986 to 10.8% in 2001.

Invest

According to Earnst and Young, Catalonia was the third European region for international inward investment projects (368 projects or 13%) during the period between 2000 and 2004 (after London and Paris). The volume of effective gross investment in Catalonia also increased by 42% between 2004 and 2005. Barcelona has continued consolidating its position as one of the most outstanding European cities in terms of growth in gross value added. Data published by Cambridge Econometrics for the period 2001-07 place Barcelona in ninth position in the European ranking. European Cities Monitor 2006 report shows that the city has moved up one position since the previous year. Barcelona now occupies fourth place in the table of best business cities.

The relationships between tourism and culture and the attractiveness of Barcelona are well understood by the local population. In a survey of residents, attitudes to tourism in 2007, 84% agreed that tourism improves the international image of the city, 81% that it strengthens the economy and 77% that it generates employment. When asked about future strategies for the development of tourism, 92% were in favour of developing cultural tourism.

The role of residents in promoting and developing cultural tourism has also been recognised by Creative Tourism Barcelona, which has used the strong flow of visitors attracted by the creativity of the city to provide a forum for creative exchange between visitors and residents. The website (www.barcelonacreativa.info) acts as a broker service, linking creative people who want to visit Barcelona with local artists and cultural associations. It finds venues for people who want to perform, and courses for those who want to learn. This programme has been one of the factors in a strong growth in tourists learning the local Catalan language in the past two years.

Sources: Turisme de Barcelona 2007, Richards 2006, Observatori Barcelona

Chapter 4. Conclusions, Policy Implications and Long-Term Challenges

Conclusions

This review has indicated the importance of culture and tourism as drivers of attractiveness and competitiveness. It seems that most regions are now actively developing their tangible and intangible cultural assets as a means to develop comparative advantage in an increasingly competitive tourism marketplace, and to create local distinctiveness in the face of globalisation.

Culture and tourism are linked because of their obvious synergies and their growth potential. Cultural tourism is one of the largest and fastest growing global tourism markets and the cultural and creative industries are increasingly being used to promote destinations and to increase their competitiveness and attractiveness. The increasing use of culture and creativity to market destinations is also adding to the pressure of differentiating regional identities and images. A growing range of cultural elements are being employed to brand and market regions. Culture and tourism are therefore essential tools to support the comparative and competitive advantage of regions in global markets.

Regions can develop considerable synergies between culture and tourism which can increase their attractiveness as destinations to visit, live and invest in, enhancing their competitiveness. In order to achieve this, partnership is essential. The complexity of both the tourism and cultural sectors implies that platforms must be created to support collaboration, and mechanism must be found to ensure that these two sectors can communicate effectively.

The growing scope of “culture” and the cultural and creative industries also means that regions need to adopt a broad approach to culture, which includes not just physical heritage, but also intangible heritage and contemporary creativity. The approach to partnership also needs to be broader as well, going beyond the bounds of traditional heritage tourism and

embracing artistic creativity and the lifestyle and “atmosphere” of the destination. Such trends are underlined by the recent UNESCO Convention for the Safeguarding of Intangible Cultural Heritage, which has created a new avenue for regions to bring their intangible cultural treasures to a global audience. This offers particular opportunities for regions where the physical cultural heritage may not be as plentiful, but where the diversity of intangible culture is very rich (particularly in Africa, Asia and Latin America).

One of the problems with adopting such innovative approaches to the relationship between culture and tourism is the relatively traditional approach to culture and tourism taken by most regions. A recent survey of cultural tourism policy makers in Europe concluded that “cultural tourism in Europe is traditional rather than innovative. it was agreed that the traditional cities for cultural tourism in Europe are not innovative enough, resulting in a loss of market share in favour of relatively new destinations and cities with innovative products.” (European Travel Commission, 2005)

One of the reasons for this is the lack of imagination in policy making in general. As the Association of Regional Observatories (2005:29) argues: “Competition has pushed local and regional policy toward the easy solution: homogenisation of the 'place product' because the market is the same (globalised) set of investors, tourists, consumers.” In their efforts to cater to the needs of such markets, it appears that regions often come up with the same solutions to the problem of linking culture and tourism to increase attractiveness.

Table 3.1 underlines the extent to which regions across the globe are developing cultural itineraries, which have very much the same form and managerial structure in different locations. Similarly, regions identify and copy innovations from each other very easily: the success of Bilbao with the Guggenheim Museum is a much sought-after innovation – there are currently 60 cities in the queue to open a new Guggenheim Museum (Richards, 2007).

The copying of models of cultural development also extends to the field of intangible culture, as the proliferation of festivals and cultural events testifies. The success of the European Capital of Culture has spawned imitators across the world, and the competition to win the title has intensified. Cities and regions are now spending large sums of money just to compete for the title and the branding and marketing benefits it brings (Richards and Palmer, 2007). Similarly, a growing number of regions are vying to have their intangible heritage designated by UNESCO, in the hope that this will generate cultural tourism in the same way that World Heritage Sites have already done.

In their search for a “quick fix”, many regions seem to be ignoring the growing evidence that effective cultural and tourism development is a long-term process. The case studies of Glasgow and Barcelona in the current report underline this point. Both of these cities began their cultural development programmes in the early 1980s, and it is only now that they are beginning to see the full benefits.

The evidence presented in this draft report makes it clear that in addition to developing innovative and creative strategies to link culture and tourism, regions also have to communicate their products effectively to clearly identified target markets. The use of Internet to promote regional culture and tourism is becoming indispensable as a promotional tool, but the marketing message needs to be delivered to tourists with the motivation to consume the cultural products of the region. More work needs to be done on identifying the elements of the cultural product and the resulting cultural experiences that are likely to be successful in global markets.

Developing a profile for the region is clearly easier with effective collaborative marketing. Many regions are developing stakeholder networks which can support such initiatives, but the marketing proposition is still based largely on products which share a physical space rather than clearly identified theming or links to specific target markets. Regions need to target more effectively, as well as linking together the different parts of their product in terms of “visit, work, live, invest” benefits if they are to fully develop their attractiveness and competitiveness.

Policy implications

The most important policy implication seems to be that leadership is required to provide the long-term vision, positioning, partnership arrangements and innovative products necessary to succeed in a highly competitive global market. A long-term view is particularly important because changing the image of a place or increasing its attractiveness is not something that happens overnight. In most cases, a period of 20-25 years is required to realise the full benefits of sustained interventions in the field of culture and tourism, as the examples of Glasgow and Barcelona indicate. A whole series of steps need to be taken to develop a successful synergy between cultural and tourism, and these need an adequate policy framework to be established.

The most important aspect in linking tourism and culture is to develop an effective partnership between stakeholders in the two sectors. In many cases the problem is that there are different approaches: the profit motive vs. non-profit, markets vs. public, etc. The role of any platform trying to bring

these two sectors together must be to identify their common interests and to act as a mediator between them. It is clear that there is a common interest in the attraction of people to the regions in which they are based, but very often differences in approach get in the way. In the tourism sector it is normal to speak about visitors, conceived of as customers or clients, whereas the cultural sector is more concerned with residents, usually seen as audiences or citizens. When it is made clear that tourists are also part of the cultural audience (albeit having travelled further to participate) then these differences can be overcome.

As well as partnership between tourism and culture, it is also important to build other forms of partnership, for example with other regions, between the public and private sectors and between a region and its citizens. Links between regions can extend the cultural opportunities available to tourists and help to support new and innovative product offers. Working with the private sector is essential for attracting investment and continuing to improve the quality of both the cultural and tourism offer. Convincing residents of the benefits of tourism development is increasingly crucial as they come to form the core of the cultural and creative tourism experience. Migrant groups among the resident population are also important partners, not only because cultural diversity adds to the attractiveness of regions, but also because their links with their home culture can also provide important motivations for visitation.

As residents become more important as hosts for cultural tourists, alternative, non-commercial forms of accommodation may also grow in importance (for example couch surfing and house swapping). Research in Indianapolis (Fu, *et al.*, 2007) suggests that up to 40% of cultural tourists stay with friends and relatives and the ATLAS data also suggest that in many destinations over 30% of “cultural tourists are staying in non-commercial accommodation. Regions may therefore have to look much wider than the commercial tourism sector to host cultural tourism, and they may also have to look further than the traditional ‘cultural sector’ to provide the kind of attractions that many cultural tourists are seeking” (such as the Korean Temple Stay Programme – Box 3.18).

In order to attract these “long distance audiences”, however, it is important that they are made aware of what the region has to offer. The natural reflex of the destination region is to exhibit every aspect of the local culture, underlining the richness and variety that the visitor can encounter. This product based approach very often ignores the fact that the visitor has little or no knowledge of the local culture, and is unlikely to be impressed simply by cultural diversity, because they also tend to come from equally rich and varied cultural regions. The key point is that destinations need to identify aspects of their cultural offerings which are likely to appeal to

specific target groups from the tourist population they are trying to attract. In this sense, tourism marketing is no different from cultural marketing. Cultural institutions have long been used to targeting specific groups within the local population to attract them to their productions. The tourist audience, however, still tends to be treated as a single target group, when the reality is that tourists are likely to be just as varied in their tastes as the local audience.

This is also an important implication of the increasing competition between regions for an increasingly global cultural audience. Regions tend to think of themselves and their culture as “unique” (which of course they are). At the same time, they have to convince different stakeholder audiences that they have everything. In the Trenčín region of Slovakia, for example, the slogan chosen to underpin the new branding is “the region where you will find everything!”. However, this broad brush approach does not tend to strengthen regional branding, and it does not help to establish a distinctive regional identity. One of the key roles of regional tourism authorities, therefore, is likely to be in making choices between the many products that could be promoted for cultural tourism, and finding combinations of products which create distinctiveness and support the development of authentic regional culture.

In thinking of ways to create distinctiveness, regions also need to look beyond the commercial providers of tourism products to seek out new and innovative products. It is symptomatic of the attitude of the tourism sector that “non-commercial” activities are seen as a problem rather than an opportunity. In reality, as cultural tourists increasingly search for “authentic” experiences of “everyday culture”, they are more likely to avoid commercial products.

Long-term challenges

In the long term, therefore, regions will have to be increasingly innovative in the way they develop, manage and market culture and tourism. This is particularly true if they want to extract the full range of benefits from this relationship for people who visit, live in, work in and invest in the region. The following are issues that regions will likely have to address.

Challenges of funding culture

One of the major issues for the cultural sector is funding. As culture is often seen as a necessity to which all should have access, cultural goods and services are often priced low to facilitate this. As a consequence, the

economic benefits to be derived from tourism are often limited for the cultural institutions themselves. As regions come under increasing pressure to justify funding for culture along with all other public goods, then it is important that the cultural, social and economic value of culture does not go unnoticed. It is important that regions find mechanisms to ensure that some of the economic benefits generated by tourism flow back to the cultural institutions which generate them.

Need to create sustainable relationships and avoid tourism damaging cultural resources

At the same time, it has to be recognised that cultural tourism may place a greater burden on the cultural infrastructure and the local community than other forms of tourism. Although cultural tourists are perceived as “good” tourists because of their cultural interest, this interest may itself cause problems. The desire to experience the “local” and the “authentic” culture may place visitors in competition with local people for certain services and resources. Cultural tourists are also more likely to want to visit cultural attractions which are vulnerable to visitor pressure, and which may require special management and conservation measures as a result.

Integrating cultural, tourism and national/local development strategies

It is clear that most regions now recognise the benefits of integrated development strategies which tackle issues related to living, working, investing in and visiting the region. In many cases, policies that are beneficial for residents will also be attractive to visitors, and *vice versa*. A good example is the “slow cities” movement which started in Italy. The philosophy of developing a city with a slower pace of life, a slower way of preparing and eating food and a richer network of contact between residents is also extremely attractive for tourists. In other words, it is also important for policy makers to think in an integrated manner about the relationship between tourism and culture, and how they both affect the life of the region as well as how they make it more attractive for visitors.

Dealing with multicultural societies and intercultural dialogue

It is also clear that regions everywhere have to deal with increasingly diverse resident populations. At first sight this may seem to be problematic in presenting local culture to visitors, since the stereotypical relationship of one population group with a single region is increasingly tenuous. At the same time, however, a growing number of regions are also beginning to

embrace diversity as a resource for culture and tourism. This should not be viewed as a one-dimensional relationship between ethnic “enclaves” and tourism consumption, but rather as a creative source which can not only generate new forms of cultural attractiveness, but which ultimately create new relationships between regions around the globe.

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Part II. Case Studies from Five OECD Members

Chapter 5. Introduction

The current analysis is largely based on original case study material supplied by selected OECD countries. These and other relevant case studies identify best practice examples of how culture can be used to enhance regional attractiveness. This book also analyses the available secondary information relating to:

- Volume and value of tourism related to cultural assets.
- Factors attracting tourists to culture.
- The importance of culture as a factor in destination choice.
- Strategies for developing culture for tourism.
- The articulation between tourism and cultural policy.
- Trends in cultural consumption.

Case studies have been provided by Australia, Austria, France, Greece, Italy, Japan, Korea, Mexico, Poland, Portugal, Romania, Slovakia and Turkey. Each case study was prepared in a rather comparable format, which include the following elements:

- Background of the location/territory and inventory of cultural resources.
- Issues related to destination attractiveness.
- Typology of programmes (location branding, rejuvenation of the location, attractiveness of the location, competitiveness of the location).
- Programme features.
- Institutions and agencies responsible.

- Lessons learnt and evaluation.

The standard case study format allowed comparisons to be drawn between destinations in different parts of the world, as well as the identification of common themes in the relationship between tourism and culture. Examples taken from the case studies were also used throughout Part I to illustrate key points.

Chapter 6. The Port Arthur Historic Site, Australia

Introduction

This case study presents the characteristics of the Port Arthur Historic Site and its origin, structure and potential in relation to driving attractiveness of the location.

It is noted that attractiveness is seen as just one of the many elements that make up the overall competitiveness of a location. The process of attraction is multi-dimensional and its success relies on a sound combination of its constituent elements.

It is important also to acknowledge that a wide range of political, economic, social and legal factors also impact on attractiveness.

Background

Site characteristics

The Port Arthur penal settlement began as a small timber station in 1830. The initial decade established the first manufactories including ship building, shoemaking, smithing, timber and brick making. The 1840s witnessed a consolidation of the industrial and penal nature of the settlement as the convict population reached more than 1 100.

Port Arthur Historic Site is a place of cultural significance for Tasmanians and Australians alike, as well as being of considerable relevance to international visitors, particularly those from the British Isles and nations with a shared British colonial history.

The site has been a significant visitor attraction since it ceased being a prison in 1877, and has played an important role in the development of tourism infrastructure, investment and community in the region.

The influx of tourists following the settlement's closure created a financial base for the fledgling Port Arthur community and by the 1930s the

Port Arthur area had three hotels, two museums, and a number of guides (www.portarthur.org.au, 22 February 2008).

The site is managed by the Port Arthur Historic Site Management Authority (PAHSMA) and is the largest employer in the municipality. It is also the state's most visited tourist attraction, drawing approximately 250 000 Tasmanian, Australian and international visitors each year to its daytime activities, and a further 45 000 to 50 000 annually for evening Historic Ghost Tours.

The PAHSMA Branding Strategy (2008) for the site articulates its essence as a historic centre of preservation, interpretation, interaction and education in respect to Tasmania's (and Australia's) history and heritage. The key values are:

- About convict history
- About Australia's heritage
- National significance
- Authenticity
- Thought provoking

Structure

The site's own cultural assets, together with the Tasman region's natural environment and diverse economic activity, form the basis of a unique selling proposition for the site specifically and the destination generally.

However, central to the success of the development of the site has been the implementation in 2000 of an ongoing program of recurrent (five-year) funding. PAHSMA has to date received AUD 14 million over seven years from the Tasmanian government, commencing in the financial year 2000-01¹, specifically for conservation and interpretation work plans as set out in the 2000 PAHSMA Conservation Plan.

This funding mechanism allows the site to manage tourism services from tourism revenue while at the same time preserving the site by funding for archaeology, conservation and interpretation projects. Consequently, the PAHS has been able to extend the location's attractiveness for visitors, residents and investors and increase its competitiveness.

The move to recurrent funding from the previous structure of annual funds arose partly in response to a sharp decline in visitation following the Port Arthur massacre of 1996². This alteration has led to a significant increase in the capacity of PAHSMA, a state government business enterprise, to develop sustainable heritage conservation, management, marketing, communications and product development programs.

At the same time, the funding has enabled PAHSMA to meet the overarching requirements of the Port Arthur Historic Site Management Authority Act 1987 which defines the functions of the PAHSMA as:

- Ensuring the preservation and maintenance of the Historic Site as an example of a major convict settlement and penal institution of the 19th Century.
- Coordinating archaeological activities on the Historic Site.
- Promoting an understanding of the historical and archaeological importance of the Historic Site.
- Promoting the Historic Site as a tourist destination.
- Providing adequate facilities for the use of visitors.

Contribution of the cultural asset

The contribution of the Port Arthur Historic Site to the development of Tasmania can be valued through use, both direct (recreational, commercial, educational, aesthetic and social) and indirect (research dissemination and non-use values for example, pure existence and vicarious consumption values). Visitor numbers to the site have grown significantly since the recurrent funding program commenced in 2000 (Table 6.1).

Although the trend was upward from 2002, coinciding with additional sea and air access to Tasmania, numbers softened in 2006-07 in line with reduced leisure visitor numbers to the State. It is to be noted that in the current year, this trend has been reversed, with increased numbers and market share to Port Arthur Historic Site.

Table 6.1. Australia: Visitor number increases in Port Arthur Historic Site

YEAR	DAY VISITORS	GHOST TOUR VISITORS
2006-07	237 664	46 765
2005-06	251 000	53 500
2004-05	253 362	56 542
2003-04	253 122	58 951
2002-03	226 154	54 836
2001-02	201 099	48 975

Source: PAHSMA Annual Reports

An economic assessment of Port Arthur's state-wide contribution has been calculated based on the final demand for Port Arthur's services through its turnover. This is a 52% increase in Gross State Product (GSP) from USD 16.454 million in 1999 to USD 25.098 million in 2003 and, in employment terms, an increase of 57% in full time equivalent (FTE) employees from 182 to 286 for the same period.³

These increases are largely attributable to the recurrent funding mechanism that has enabled the site to sustainably plan, recruit staff (particularly professional conservation staff) and innovate.

Issues related to enhancement

The following projects, undertaken up to and including 2007, demonstrate the successful diversification of the PAHS product offering and the ways in which the site provides competitive advantage for the region:

- Reconstruction of the Government Gardens (researched through archival, archaeological, pictorial and pollen analysis).
- A ten-year partnership with local operators in a ferry service at the site.
- The implementation of a direct ferry route from Hobart to Port Arthur.
- Opening of the Point Puer⁴ site to visitors.
- A new Interpretation Plan incorporating a thematic approach.
- An Orientation Tour to the Isle of the Dead.⁵
- Introduction of Garden and Archaeology Tours.
- Refurbishment of the Port Arthur Museum.

- Visual interpretation of the Asylum Building.
- A Summer Plays Public Program.
- New visitor information booklets.
- Summer Public Archaeology Programs⁶.
- Development of a Port Arthur Convict Database (with an excess of 6 500 convicts).
- Opening of the Convict Study Centre.
- Convict Water Supply Trail.
- Participation in the Ten Days on the Island⁷ Festival.
- Introduction of a two-year visitor pass targeted at the intrastate market (Ticket of Leave).
- Presentation of “130 years of Tourism at Port Arthur”, an exhibit that forms part of the 2008 Tasmanian Heritage Festival.
- Dockyard Precinct where, over a 14-year period, approximately 200 vessels were built ranging from whaleboats to ships of 300 tons - the project includes two buildings for museum and related interpretive purposes.

Of particular significance has been a focus on strengthening the site’s relationship with the local community via:

- Provision of substantial financial support for the local regional tourism marketing association.
- Community forums and a “Port Arthur Talks” program.
- Free entry to the site for Tasman Peninsula residents.
- Sharing of conservation expertise with local tourism operators.
- Assistance with funding applications from local tourism operators – owners of significant heritage property assets.

- Sponsorship of local clubs and organisations, schools and sporting groups.
- A series of major events on site.
- A comprehensive work experience programme with the Tasman District School.
- Conservation and heritage workshops promoting best practice conservation methodology.

The attributes of the PAHS have been further enhanced within the context of its location – the Tasman Peninsula.

The Tasman Peninsula is noted for its spectacular coastal scenery (including ancient sea cliffs reaching heights of 300 metres), endemic flora and fauna, and internationally significant geological features including the Tasman National Park, Eaglehawk Neck and State Reserves.

The range of habitats found within the small and insular environment of the Tasman Peninsula provides for high natural diversity. Flora and fauna are in a relatively natural state, with several species endemic to the peninsula and several birds listed as threatened species frequenting this area.

These natural assets have given rise to a number of complementary activities including nature-based tourism businesses such as sea cruises, fishing charters, wildlife parks and walking tours.

Interaction between local and state government

PAHSMA's close association with the Tasman Council⁸ has resulted in several key development initiatives, one of which was the formation of the Tasman Tourism Development Strategy (TTDS) in 2005.

The TTDS is a three-year strategic tourism plan that was initiated by the council with a funding grant from the Tasmanian government's tourism marketing and development arm, Tourism Tasmania. The plan assesses national, state and local trends and macro-economic factors in relation to tourism in the region.

The strategy is a blueprint for the further development of the region and a key recommendation was the development and promotion of a "new" set of experiences to complement those currently existing on the Peninsula.

The strategy clearly aligns with Tourism Australia's focus on the need to highlight experiences that best meet the motivations of Australia's target

audience while differentiating the destination from the competition, in fact “this approach will expand the experience palette for Australia, generate greater conversation and involvement with the destination, increased dispersal and ultimately, higher spend and revenue for the Australian industry.” (www.tourismaustralia.com, 27 February 2008)

The following criteria were utilised in the Tasman Tourism Development Strategy 2005 to assess gaps and opportunities. Ability to:

- Generate increased visitation to the region.
- Increase visitor expenditure.
- Increase overnight stays.
- Encourage private investment.
- Encourage public investment.
- Benefit the local community.
- Help protect existing market share.
- Enrich the overall visitor experience in the region.

The strategy will facilitate the development of sustainable tourism and hospitality initiatives that address these criteria. For instance, a new initiative in the area is the proposed Three Capes Track,⁹ a walking and water experience currently being developed utilising a cross-government agency approach.

The TTDS forms part of a wider partnership with the Tasman Council and State Government through PAHSMA. Initiated in May 2004, a partnership agreement between PAHSMA and the Tasman Council was completed in May 2007 and has contributed to a range of positive outcomes.

The achievements of the PAHSMA and Tasman Council agreement are illustrated through such activities as the Tasman Community Arts Group, concerts, regional brochures, and funding for infrastructure in the form of boating and visitor facilities. The agreement has also contributed to the overall social, intellectual and economic life of the Tasman Peninsula including:

- Sponsorship arrangement with the local community radio station, Tasman FM.

- Sponsoring a local group “The Barking Dawgs” to enable them to promote a week of performances in Hobart and regional areas.
- A ceremonial service commemorating the tenth anniversary of the Port Arthur Massacre.
- An agreement to allow several local Port Arthur businesses to connect to the Port Arthur Wastewater Treatment Plant (PAHSMA operates the only reticulated water system and sewerage treatment plant in the municipality).

The support of the State Government has brought financial stability to the PAHS which has enabled the site to work collaboratively with local government and industry stakeholders to harness the natural and economic resources of the region and drive investment in tourism infrastructure to deliver benefits throughout the region. In short, this work enhances the attractiveness of the region.

Issues related to the operating environment

Role in marketing the region

PAHSMA has played a pivotal role in respect to tourism promotion on the Tasman Peninsula, most recently through its role as a major financial contributor to the regional marketing organisation, Port Arthur Region Marketing Ltd (PARM), which operated between 2000 and 2006.

During this period PARM was the primary marketing agency for the Historic Site and for tourism in the Tasman region generally. However, following a strategic review of PAHSMA’s marketing operations undertaken in 2006, and the renewed “whole of region” focus of the TTDS, PAHSMA decided to reduce its funding support of PARM. This resulted in the dissolution of the organisation and its associated Visitor Information Centre operations being transferred to PAHMSA.

In 2007, the Port Arthur and Tasman Tourism Association (PATTA) was established with financial support from both PAHSMA and the Tasman Council in keeping with a key recommendation of the TTDS.

PATTA is a membership-based local tourism promotion entity promoting the site and the region through support from the Tasman Council and PAHSMA, as well as by membership subscriptions and occasional grant funding.

Within the wider environment, PAHSMA’s activities are heavily influenced by changing patterns of tourist visitation to Tasmania. A number of recent events have contributed to a shift in consumer behaviour, impacting on the Tasmanian visitor market, and resulting in an overall softening of recent high growth rates in tourism and industry yield. These include:

- Shorter holidays by Australian travellers.
- The strengthening of the Australian dollar (decline of the U.S. dollar).
- Dramatic fluctuations in fuel prices.
- Increased competition in the domestic marketplace.
- The increased affordability of international travel contributing to significant changes in domestic Australian travel patterns.

In addition, there is a growing trend by consumers to bypass traditional booking and information sources such as wholesalers, travel agents and visitor information centres and book direct. This presents ongoing challenges for many tourism operators in terms of promotion and distribution.

Currently, 78% of visitors (2006-07) to the site purchase their ticket on arrival and 22% purchase in advance through local accommodation providers, tour operators, travel agents or the Tasmanian Visitor Information Network. PAHSMA has an opportunity to strategically develop new digital, online, distribution and product packaging strategies to cater to these consumer trends.

As Tasmania’s tourism industry continues to grow, the challenge for PAHSMA is to continue to maximise visitor numbers to the site and ensure market share is maintained. The proximity to the State’s capital city, Hobart, enhances this ability.

Location branding

Branding is used to address perceptions of the cultural resources to develop the image and identity of the location. For this purpose PAHS’s identified values are:

- Maintenance of the current high ranking values such as history, national significance, education and “our” heritage.

- Increased perceptions of authenticity.
- Pre-visit awareness and familiarity.
- Interactive interpretation.
- Features awareness and familiarity (Isle of the Dead, Point Puer, Audio Tours, etc.).

Other key issues to be addressed include:

- Port Arthur's level of awareness and familiarity in the context of the overall Tasmanian visitor experience.
- Pre-visit familiarity in the context of increasing satisfaction levels and duration of visit.
- The continued development and promotion of packages designed to enhance visitor experience and increase spend per visitor.
- Point of entry education and familiarity at peak times in the context of enhancing visitor experience.
- Continued promotion to schools.
- Designing location packages for overseas visitors.
- The opportunity to satisfy a growing need for personalised (high end) visitor experiences where expense is not a key criterion.

A key element of the PAHSMA marketing plan is in articulating experiences to visitors in order to increase pre-visit familiarity with the offering leading to visitors' understanding that Port Arthur is a place to hear stories, connect to the past and perhaps reveal truths about the present and future.

This in turn has the potential to improve pre-planning of visits, encouraging a greater number of overnight stays in the area as the value of the site and the region is better communicated and understood.

As at March 2008, PAHSMA's marketing plan was still in the developmental stage, although key elements were being implemented. At this early stage, visitor numbers in March 2008 were ahead of projections

and over and above the same period in the previous year, that is, Day Visitors for the year were 208 730 and Ghost Tour Visitors were 40 236.

Rejuvenation of the location

With the strengthening position of the Port Arthur Historic Site, particularly since 2000, substantial expansion or redevelopment of tourism-related businesses in the Tasman Region has occurred. These have included new restaurant and eating facilities, accommodation development including conference facilities, adventure water-based experiences and wildlife viewing options.

Illustrative policies

PAHSMA promotes the place in a manner that increases public appreciation of the site's heritage values, while enhancing the quality of the visitor experience, maximising the economic returns from visitors and positioning it in the forefront of other tourism sites.

Evaluation of visitors to the Port Arthur Historic Site will continue to be undertaken on a regular basis to better understand visitor profiles and the values widely held by Tasmanians and Australians. This information will be used to assist in the development of interpretive, educational and information measures and visitor infrastructure that appropriately present the heritage values of the Historic Site to the community, as well as to improve the quality of the visitor experience.

Future management actions (PAHSMA Draft Statutory Management Plan 2007) are to:

- Explore a range of tourism products and admission pricing structures to enhance the visitor options and financial returns for the Authority.
- Endeavour to ensure that the staff and external stakeholders, including tourism marketing personnel, develop an understanding of the heritage values of the Historic Site and PAHSMA's tourism objectives.
- Encourage the participation of staff members in the development of tourism policies and products for the Historic Site.
- Maintain an overview of all aspects of the marketing of the sites, including advertising, sponsorship, signs and external contractors, to ensure compliance with its policies.

- Regularly review and revise marketing strategies.
- Continue to provide support and guidance to regional marketing (PATTA).
- Monitor the level of media coverage and messages related to the site and its heritage values, management issues and PAHSMA.
- Prepare a program for regular research, monitoring and evaluation of visitors to the Historic Site.
- Evaluate market research to determine whether relevant management objectives are being achieved.

Future projects

- The Separate Prison – document and scope of works to conserve and interpret the Separate Prison complex with the assistance of a Federal national heritage grant.
- The Penitentiary – a flagship project over five years involving total replacement of the existing support and viewing structure and providing a physical and conceptual platform for delivery of a state of the art interpretation program.
- The Military Precinct – the development of an innovative approach to interpreting the above ground elements of what was a complex military landscape with substantial structures.
- World Heritage Listing – The Port Arthur and Coal Mines Historic Sites in conjunction with a number of convict sites in three Australian states and Norfolk Island have prepared a serial nomination for World Heritage Listing (lodged in January 2008). The nomination will be assessed over the 2008-09 year. Successful nominations will be announced at the annual meeting of the UNESCO World Heritage Centre in June 2009.

Lessons learnt and evaluation

The Authority reassessed its marketing strategy during 2006 in response to the TTDS and to a range of major factors affecting tourism globally, within Australia and Tasmania in particular.

As a result of the review, PAHSMA appointed a full-time marketing manager to its staff and is developing a renewed strategic marketing plan for the organisation.

Visitor research undertaken in late 2007 identified four core visitor segments based on motivation to visit and response to the Historic Site. These segments are not related to demographic factors in any way – instead they are a product of individual preferences and experience.

The four segments were similar in magnitude, each accounting for between 20% and 30% of visitors, they are described as:

- The Entertainment Seekers – seek activity and “interactive” experiences (the site’s summer History Plays program is a highlight).
- The Emotional Responders – tend to be more moved by the scenic appeal, location and history, both colonial and recent, of the site.
- The Information Seekers – keen to find out more about the site, its stories, history and experiences, to gain a deeper appreciation and understanding.
- The Tourists – attracted by the site’s iconic status and reputation, happy to look but not motivated to develop further engagement.

The survey results have highlighted PAHSMA’s success in developing high quality interpretation and development programs, that have relevance and meaning to a diverse set of expectations. All segments surveyed reported very high levels of satisfaction with their experience at the site with 97% of visitors across all four segments reporting being satisfied or better with their visit¹⁰.

Long-term perspectives

The marketing plan for the site includes key objectives to uphold the obligations of the PAHSMA under its Act and its Ministerial Charter, while striving to achieve increased visitor numbers, higher yields and enhanced promotion of the cultural heritage values of the site.

The marketing strategy also addresses the enhanced status of the Historic Site as a cultural tourism destination as a result of its inclusion in the National Heritage List, and potentially, the World Heritage List.

The marketing plan will aim to further enhance PAHSMA's reputation for innovation and excellence, as well as appreciation of the site's heritage values among a range of audiences beyond tourist visitors, such as students, heritage professionals, teachers and researchers.

In summary, the recurrent funding programme for the PAHS is evaluated on a regular and ongoing basis through reports, research and statutory performance monitoring. Key identified outcomes to date are:

- A robust long-term conservation outlook for the site and its assets.
- Enhanced interpretation of the site and surrounds, central to which lies the engagement and education of visitors and the wider community, a key focus of which has been on research to facilitate truth and honesty in interpretation.
- Provision of an enhanced “individual” visitor experience and a broadening of target segments through product development and engagement with the other sectors including the arts community.
- Development of “authentic” experiences where commercialisation is not the central precept, which allows space for people to have their “own” experience, to interact and engage, to have an emotional response, to be entertained or just pass through.
- Better positioning in response to societal trends that suggest that a broad spectrum of society is at the point of engaging with history and heritage, with a clear desire to find out where individual people fit, where they have come from and where they are going.
- Significant regional investment and partnership, and an increasing economic impact on the region as the success and viability of the site encourages greater regional investment in products and infrastructure.
- Ability to attract international standard conservation and archaeological expertise and plan and scope effectively to capitalise on opportunities brought about by this enhancement.
- Successful marriage of conservation and tourism operations.

It should be noted, however, that despite the significant achievements of the program, the nature of the funding model means that the authority is required to continually expend significant resources on assembling a case to the state government as the political landscape evolves.

Notes

1. Refers to fiscal year (1 July to 30 June).
2. The Port Arthur massacre of 28 April 1996 claimed the lives of 35 people and wounded 37 others mainly at the historic Port Arthur prison colony, a popular tourist site in south-eastern Tasmania, Australia.
3. A report commissioned in 2004 by PAHSMA in support of a funding submission to government for the site's Conservation Program for 2005-10.
4. The site of an experimental boys' reformatory between 1834 and 1849 of cultural significance in relation to the reformation of the treatment of young criminals in post-industrial British society.
5. Between 1833 and 1877, about 1 000 burials took place on the island.
6. Port Arthur runs the largest and longest running recurrent public archaeology program in Australia.
7. A biennial state-wide arts and cultural celebration.
8. Tasman Council is a local government area of 660 km² located on the southeast of Tasmania and encompasses the Forestier and Tasman Peninsulas.
9. In September 2006, the Government invested AUD 100 000 in a feasibility study into a new iconic 6 day, 5 night bushwalk on the Tasman Peninsula. This was completed in March 2007.
10. PAHSMA Brand Review Survey, 2007.

Chapter 7. The Vorarlberg Province, Austria

Background

Location and economic development level of the destination

Vorarlberg is the Federal Province located at the most western part of Austria. From a cross-border perspective, Vorarlberg forms part of the international Lake Constance area, which includes parts of Germany, Switzerland and Liechtenstein. The international Lake Constance area is a region characterised by dynamic growth and a highly developed business and recreation area; its immediate sphere of influence encompasses the large urban centres of Stuttgart, Munich and Zurich. Vorarlberg has an area of 2 601.48 km² and has 363 880 inhabitants (December 2007).

In an international comparison, its economy and living standard in general, and also its tourism and recreation industry, present a high development level and above-average growth. The economic structure, dominated by small and medium-size enterprises, is characterised by new, knowledge and technology-oriented companies and businesses with an ever increasing sectoral diversity and by-structures typical of the creative industries, with particularly high export rates and good competitiveness.

In mid-2006, Vorarlberg housed 8 561 businesses in trade and industry with a total of 102 020 employees.

Today, Vorarlberg counts among Austria's and Europe's most economically powerful regions. In 2003, the per capita regional product of Vorarlberg was EUR 29 500, that is, EUR 1 500 or 5.4% higher than the Austrian average, a figure topped only by Vienna and Salzburg. Compared with the average of the other NUTS-2 regions in the EU-25 member states, Vorarlberg's gross regional product per inhabitant reached 125.6% in 2002.

The share of the individual business sectors in added value also demonstrates the advanced development level of Vorarlberg's economy. In 2003, agriculture and forestry accounted for 0.8%, manufacturing for 40%, and the service sector for 59% of added value generated in the province.

Situation in tourism

Vorarlberg is characterised by a topographically fragmented natural landscape, consisting of an attractive lake area and extensive forest and mountain areas with varying cultural settings. Both from a natural and a cultural perspective, the region offers good development conditions for winter and summer tourism, as well as summer mountain recreation.

Vorarlberg has a landscape diversity in such a small area rarely found anywhere else. The quality of the landscape experience is to a great extent determined by unscathed natural beauty and various types of cultivation by man, ranging from natural farming to nicely groomed town landscapes.

As a result, Vorarlberg had the means to become not only a modern industrial province, but also a popular tourist destination. Vorarlberg made good use of this opportunity. Especially in rural and mountainous areas, which were less suitable as industrial or trade locations, tourism has developed well, gaining not only a high economic but also considerable social significance. From a general point of view, tourism has contributed to reducing the wealth gap between the increasingly urban agglomeration of the Rheintal and the mountain valleys and other mountain regions.

Tourism contributed to achieve the objective of sustainably guaranteeing the basis of livelihood in all geographical regions of the province, an objective which is also incorporated in Vorarlberg's Regional Planning Act.

In an ecologically sensitive mountainous region like Vorarlberg, the link between tourism and agriculture is particularly close. Farming determines the appearance of large parts of the cultivated area, and greatly contributes to its maintenance. In addition, agriculture produces high-quality food supplies for the hotel and restaurant industry, and is also a source of accommodation as part of the "holiday on a farm" scheme. For this reason, the attractiveness and competitiveness of Vorarlberg as a tourist destination is a matter of survival for most regions of the province.

Today, the tourism and recreation industry account for approximately 15% of the gross regional product of Vorarlberg. Up to a total of 12 600 people are employed in the hotel, catering, and cableway businesses. Tourism today represents one of the pillars of Vorarlberg's economy. The contribution of the catering and accommodation businesses to added value amounts to 6.1%, well above the Austrian average of 4.6%. The accommodation business registers approximately 8 million overnight stays each year, the visitors from Germany occupying a market share of around 65%. Other important foreign markets include Switzerland and Liechtenstein, with a market share of 9%, and the Netherlands with

approximately 10%. At approximately 11%, the domestic market plays an important yet not paramount role.¹

Its relatively high economic and social importance, however, are not the only arguments in favour of tourism in Vorarlberg. An international Tourism Benchmark Study² carried out by BAK Basel Economics for the Province of Vorarlberg revealed the high competitiveness of Vorarlberg's tourism industry in comparison with twenty other holiday tourism regions in the Alps.

Although the performance of the eight destinations of Vorarlberg varies, tourism in Vorarlberg as a whole shows a high degree of competitiveness as compared to other destinations in the Alps, reflected in particular in a favourable price-attractiveness ratio. In addition, the beauty of the landscape and low environmental pollution levels constitute good conditions for a positive development of tourism in the future.

In the ecologically sensitive mountainous landscape of Vorarlberg, however, the demand for competitiveness cannot represent an excuse for all possible and conceivable developments and projects in tourism.

There are limits to the strain that the natural environment can be exposed to. It is the responsibility of the tourism business to ensure that the products offered have as little an impact on the environment as possible. It is necessary to continuously monitor development trends in tourism and assess them as holistically as possible against the background of the targets for the tourist development of the province. Long-term utility maximisation can only be achieved when the economic, environmental, and social balance is kept on the positive side. The results of a study on sustainability in the Alpine region³ show that Vorarlberg has already embarked on the right course. Vorarlberg achieved first place in the overall ranking – under consideration of the strongly networked factors of business, environment and society.

As a highly developed region, Vorarlberg is presently a tourist destination with unfavourable cost structures, exposed to international and global competition from other tourist destinations and cheap holiday providers from around the world. Despite Vorarlberg's good general conditions, this challenging situation seems all but easy to manage.

A possible solution lies in tourism development strategies that make use of the particular natural landscape and cultural conditions of Vorarlberg in an ideal, authentic, and distinctive manner, focusing on types of tourism and business models with a particular added value, distinguished by high know-how requirements and competence-enhancing links to other sectors and social development areas. What is needed is high-quality conference and

seminar tourism marketable throughout the year, skill-intensive health tourism with a typical local character, and new forms of culture tourism. Implementing forms of culture tourism that make use of the region's cultural heritage in a genuine manner, and also contemporary cultural forms appealing to a wider audience, which attract the arts-oriented leading groups in highly developed societies seem promising strategies and possibilities for survival in the international competition for markets.

Inventory of cultural resources

Cultural heritage and customs

Due to their rich cultural heritage and their international, multicultural character, Vorarlberg and the surrounding Lake Constance area possess diverse and attractive basic resources for a culturally interesting form of tourism.

Vorarlberg's distinctive features are a highly diversified natural and cultivated landscape in a small area, rich customs, and an interesting craftsman tradition, which are maintained and presented to this day with pride and openness for everything new, yet in rejection of cheap forms of tourist exploitation.

A dynamic arts and culture scene

The cities of the Rheintal present a vibrant arts and culture scene. Diverse genres of art and culture such as music, performing and fine arts, literature, and other forms of creative production are cultivated here with a focus on high quality and a considerable level of discourse and are performed in attractive locations.

There is often international attention and expert recognition for such original, creative performances. Culture, arts, and creative productions in Vorarlberg are subject to a dynamic development in an atmosphere of openness. Culture tourism in Vorarlberg no longer has to remain restricted to the use and utilisation of its historic heritage. Tradition and contemporary art production have entered a mutually inspirational relationship.

Contemporary architecture and cultural heritage

So far, the strongest expression of the exciting relationship between tradition and modernity and the corresponding cultural identity can be found in the area of architecture. Today, Vorarlberg is characterised by an

impressive omnipresence of contemporary buildings, and displays these in a direct proximity and connection to the traditional forms of construction and settlement of the Alpine Rim.

Vorarlberg presents itself as an innovative, open-minded culture and tourism region with a great aesthetic sense and with the courage and willingness for consensus required for novelty to thrive next to tradition.

As Wallpaper (August 2000) writes “... the most progressive part of the planet, when it comes to new architecture”.

International celebrations, festivals, cultural institutions, and arts events

Vorarlberg’s decisive potential for long-term success in culture tourism lies in its internationally renowned and appreciated festivals, arts institutions, and events, distinguished by an original, locally influenced creativeness and aesthetic innovations capable of generating international attention, recognition, and tourist attractiveness. The following institutions are particularly worth mentioning:

- Bregenz Festival

The unique atmosphere and aesthetic possibilities of the lake stage and the new Festival House, as well as intentionally experimental event formats, and the festive atmosphere during the festival at the lake have made the Bregenz Festival an international top event on the European summer festival calendar.

Theatre performances on the lake, operas in the new Festival House, various concerts featuring renowned orchestras, the operetta at the Kornmarkt, the “Kunst aus der Zeit” series, and special events staged by the Kunsthau Bregenz, have transformed the Bregenz Festival into a tourist magnet and the major attraction on Vorarlberg’s summer agenda.

Christmas specials and a snow opera in Lech-Zürs in Arlberg ensure that winter tourism, too, can be culturally enhanced and made more attractive.

- Kunsthau Bregenz

The Kunsthau Bregenz constitutes Vorarlberg’s regional centre of competence in the area of fine arts, and allows the province to stay connected to the international arts scene and to become itself a location for arts production and art mediation. The decisive contribution to the success of the Kunsthau came primarily from those exhibitions and

productions that encouraged invited artists to venture into new creations within the specific possibilities offered by the Kunsthaus Bregenz and Vorarlberg's cultural landscape. These original productions in public spaces attracted international attention and recognition.

The factor that contributed most to making Vorarlberg and the Kunsthaus Bregenz a particularly attractive location for the artists' creative work and the audience's interest in the arts, was, however, the communication and mediation commitment so typical of Vorarlberg and especially of the Kunsthaus Bregenz. Art mediation has become a special feature of the Kunsthaus Bregenz, something that is already being used and appreciated by international travel and congress organisers.

In Vorarlberg, the Kunsthaus Bregenz has already become active in art mediation beyond the city limits of Bregenz. The Kunsthaus Bregenz organises interesting and spectacular arts and art mediation shows in collaborating communities and tourist resorts, which attract large audiences, thus maintaining a culturally enhanced and aesthetically refined culture and tourism landscape typical of Vorarlberg.

- Schubertiade Schwarzenberg/Hohenems

In a proven mixture of top quality, a spirit of perfection, and international stars, the Schubertiade Schwarzenberg attracts culture tourists from all over the world, securing Vorarlberg's image as a qualitative, internationally oriented destination for culture tourism.

The Schubertiade has brought an international, wealthy audience to Hohenems and the Bregenz Forest, which appreciates Vorarlberg's special landscape quality and, in addition to the cultural agenda, also actively uses the recreation, natural landscape, and hiking possibilities that Vorarlberg has to offer.

- Feldkirch Festival

Through the repositioning of its festival and consistent marketing efforts, the attractive town of Feldkirch has managed to attract audiences from the entire Lake Constance area and establish a centre for youth culture appreciated by tomorrow's culture tourists from many parts of Austria, Switzerland, and Germany. The artDesign Feldkirch, an art and design fair, was established as a new culture-oriented exhibition focus for Feldkirch.

- Dornbirn: Jazz, scene, and creative industries

Dornbirn, the shopping centre of Vorarlberg, has taken advantage of its economic power and its rich cultural life to become the centre of the new arts scene in Vorarlberg. Dornbirn thus somehow distinguishes itself from the high-culture scene, making its mark as a centre for Vorarlberg's alternative culture and creative industries. The Art Bodensee is characteristic of the overall development, since this fair and the city of Dornbirn have established an important initiative for the entire Lake Constance area, temporarily transforming Dornbirn into the centre of fine arts and art trade in the Lake Constance area.

Issues related to the location attractiveness

Problems to be addressed

During the development of a future strategy for Vorarlberg's culture tourism in 2004, the following weaknesses were identified:

- Small number of own productions attracting international attention.
- Insufficient number of marketing cooperations between cultural and tourism organisations.
- Lack of intensive exchange and communication activity between culture and tourism.
- Inadequate development of the international nearby markets.
- The tourism products are not prepared in a customer-friendly manner.
- A weak culture media landscape.
- Profile as a culture and culture tourism destination is still too low.

Rationale for government intervention

For years, Vorarlberg has been pursuing a strategically sound tourism policy matching its development level. Therefore, it was a matter of time before culture tourism received the corresponding attention. What triggered the development of a culture tourism strategy, however, was the strategic

“culture tourism” priority programme launched by the tourism department of the Federal Ministry of Economics and Labour, which offered the corresponding financial support and proposed the development of international marketing initiatives on a federal level.

In Vorarlberg, the new culture tourism strategy was implemented as part of the Inno Net Programme, which focused on the definition and realisation of the most important innovations for securing the future of Vorarlberg’s tourism.

As already described, the rationale for the development of a business field strategy for culture tourism was that Vorarlberg’s highly developed tourism needs most of all to develop added-value and skills-intensive forms of tourism to secure its competitiveness in the Alps region and against globally operating cheap destinations. In culture tourism, thanks to its outstanding cultural potential, Vorarlberg has a great development opportunity for such an authentic form of tourism that generates great added value that can culturally enhance the Vorarlberg brand and provide additional opportunities for differentiation.

Typology of programme

The project Future Strategy for Culture Tourism Vorarlberg 2010+ primarily focuses on the elaboration of a strategy for the development of culture tourism. The objective was to fathom out the chances and possibilities of culture tourism in an international market environment, and to develop a suitable positioning of Vorarlberg in culture tourism. The strategy also provided for the planning and realisation of the main implementation measures and the necessary organisation and co-operation forms for the accomplishment of the new strategy.

The programme was developed in close co-operation with the regional experts and representatives of culture and tourism organisations, and represents an effective implementation impulse for jointly developed strategies and projects. Particularly interesting were the possibilities that culture tourism offers to enhance the attractiveness and distinctive character of the Vorarlberg tourism brand. The results of the culture tourism strategy were therefore integrated in a parallel development project on the Vorarlberg brand, thus giving it a stronger and more contemporary cultural character.

Applying the programme implementation to the proposed programme typologies, the following classification can be made:

The main objective of the programme was to enhance the competitiveness and attractiveness of Vorarlberg as a destination through a

new development strategy for culture tourism. A corresponding strategy and new organisation forms were developed for this purpose.

The programme of a strategy development for culture tourism also played an essential role for location branding. The reason for this was that it soon became evident that the cultural development potential and culture tourism would play a significant role in the repositioning and differentiation of the Vorarlberg brand. As a result, the new Vorarlberg brand became one with an intensive cultural character.

What seems more important than the required typological classification is its integrated strategy approach that both aims at repositioning Vorarlberg as a culture tourism destination and also attempts to determine the organisational needs and innovations in the relationship between cultural and tourism organisations.

Programme features

The main objectives of the programme “Future Strategy for Culture Tourism Vorarlberg 2010+” are:

- Identification and examination of Vorarlberg’s opportunities in culture tourism.
- Identification and presentation of the potential synergies between culture and tourism.
- Implementation of a SWOT analysis for culture tourism in Vorarlberg.
- Development and argumentation of a future strategy with an international focus.
- Development of an adequate implementation strategy and implementation organisations, accompanied by a definition of the corresponding key projects.
- Involvement and activation of the most important strategic partners from the area of culture and tourism towards developing the strategy and securing its implementation.
- Definition of the success factors for the implementation of the strategy.

The target area of the future strategy was the entire province of Vorarlberg as a destination, also taking consideration of the possibilities offered by the international Lake Constance area.

The programme's target group included the representatives of cultural and tourism organisations that possess significance for the development of a culture tourism in Vorarlberg focusing on national and international markets. The programme was commissioned and financed by the provincial tourism organisation Vorarlberg Tourismus.

The programme was funded by Vorarlberg Tourismus, the Austrian Federal Ministry of Economics and Labour, and the Provincial Government of Vorarlberg.

How does the programme work?

The programme began as a strategy development and consulting project. The organisational framework was provided by the provincial tourism organisation Vorarlberg Tourismus.

The firm “invent GmbH – Innovationsagentur für Wirtschaft, Tourismus und Kultur” was assigned with the project management and the development of the Future Strategy for Culture Tourism and had to accomplish this task during three large workshops in close co-operation with representatives of the most important cultural and tourism institutions.

Institutions and agencies responsible for implementing the programme

Vorarlberg Tourismus is in charge of instigating and organising the implementation of the programme, and has established an informal coordination platform on culture tourism, in which the mentioned implementation partners from the area of culture and tourism participate on a project basis. For the purpose of international marketing, Vorarlberg Tourismus and the Bregenz Festival participated in the strategic priority programme for Austrian culture tourism and founded the marketing organisation Creative Austria together with other partners from Austria.

Roles of national and local governments and private actions, partners, co-operation networks

Culture Tour Austria, the strategic priority programme for Austrian culture tourism was significant for the creation of the programme. This programme was initiated and financed by the tourism department of the

Federal Ministry of Economics and Labour, and was organised by the private innovation and consulting agency “invent GmbH”. From this national development initiative emerged the marketing co-operation Creative Austria, which is currently funded by major culture and tourism organisations from around Austria and has assumed important marketing tasks in culture tourism for these organisations.

Within the region of Vorarlberg, an open development and marketing network for culture tourism in Vorarlberg has emerged from the informal platform for culture tourism, which becomes active depending on the occasion or the project, and prepares and co-ordinates important marketing and development projects.

Specific measures in place

The development of the programme and future strategy and the corresponding implementation proposals have resulted in specific objectives and proposed indicators which are enumerated in Table 7.1.

Program implementation and future strategy

The practical implementation of the Future Strategy for Culture Tourism Vorarlberg 2010 represents a very demanding and complex undertaking. This major objective can only be achieved through a professionally organised implementation scheme.

The long path toward the demanding objective of becoming a leading culture tourism destination must be broken down into organisable and efficient key projects that implement the future strategy step by step and project by project.

This new quality in culture tourism can only be achieved through an effective set of joint key projects that must, on the one hand, lead to tangible success soon and, on the other hand, implement projects that secure long-lasting success stories. Therefore, the implementation of the future strategy requires quick success and the long-term commitment of the major players to a motivating and obviously attainable vision and strategy as a recipe for success.

Due to their size and complexity, the said goals and implementation proposals seem attainable only through professionally co-ordinated and conducted co-operation and implementation structures.

Table 7.1. Objectives and indicators for Culture Tourism Vorarlberg 2010+

LEVEL 1: MAJOR ECONOMIC AND STRATEGIC OBJECTIVES	
1.1	By 2010, Vorarlberg becomes the most attractive and successful culture tourism destination in the Lake Constance area.
1.1.1	Among regions bordering Lake Constance, Vorarlberg achieves the highest added value from culture tourism.
1.1.2	By 2010, the added value generated by culture tourism in Vorarlberg reaches 25%, thus accounting for approximately 10% of the total added value of tourism in the province.
1.1.3	Vorarlberg's relevant decision makers and competent authorities regard culture tourism as an independent, brand-defining business field of tourism in Vorarlberg.
1.1.4	Compared to its competitors around Lake Constance, Vorarlberg achieves the highest growth.
1.2	By 2010, Vorarlberg has the most dynamic and renowned culture scene in the Lake Constance area.
1.2.1	Culture experts and citizens in the Lake Constance area interested in culture consider Vorarlberg the most dynamic and renowned culture scene.
1.2.2	Among all destinations around Lake Constance, Vorarlberg receives the largest number of culture tourists from the Lake Constance area.
LEVEL 2: FOCUS ON DYNAMICALLY GROWING MARKETS AND FUTURE-SHAPING TARGET GROUPS	
2.1	Vorarlberg becomes the most popular culture tourist destination in the dynamic nearby market of the international Lake Constance area.
2.2	By 2010, Vorarlberg and the Lake Constance area are established among selected remote international markets as the culture-oriented holiday destination in the Alpine Rim.
2.3	By 2010, the share of new society-leading target groups among culture tourists in Vorarlberg has increased significantly.
LEVEL 3: PROCESS AND STRUCTURES DECISIVE FOR SUCCESS	
3.1	Compared to the relevant competitors, Vorarlberg has the best-performing development co-operation between culture and tourist industry.
3.2	Compared to the relevant competitors, Vorarlberg's culture tourism has the best-performing international marketing and sales system.
3.3	The international development and discourse networks in the culture sector are outstandingly good.
3.4	Vorarlberg and the Lake Constance area benefit from their integration in powerful and affordable international transport systems.
3.5	The leading products of Vorarlberg's culture tourism are organised in comfortable service chains.
3.6	Vorarlberg has a dynamic, easy-to-co-ordinate culture and arts scene.
3.7	Vorarlberg's culture centres offer co-ordinated programmes that complement each other.
LEVEL 4: INNOVATION AND DIFFERENTIATION POTENTIAL	
4.1	Vorarlberg has a communication system for modern arts and culture that covers the entire spectrum of events.
4.2	Vorarlberg's leading product, the Bregenz Festival offers the quality of experience of a major European culture party by the lakeside.
4.3	All of Vorarlberg's leading culture tourism products are committed to top quality and aim at high recognition and reputation among international experts.
4.4	Vorarlberg generates a large number of own and new productions and exploits possible regional characteristics and references to differentiate its arts and culture products.
4.5	Vorarlberg creates high-quality education, development, and creative schemes for the new milieu target groups.
4.6	Vorarlberg's culture tourism has a highly distinctive character compared to its major competitors.
4.7	Vorarlberg implements a modern, strategic culture and tourism policy.

For these reasons, there was a proposal to create and permanently establish a co-operation platform under the name Kulturtourismus Vorarlberg 2010+. This information and co-operation platform is to include the representatives of all of Vorarlberg's cultural producers, culture lovers, and tourism officials who are relevant for culture tourism.

The new co-operation platform should be headed by a corresponding management group consisting of representatives from the world of culture and tourism and receive support by a professional during operative work. The main tasks of the co-operation platform include the organisation and coordination of the future development and marketing work in culture tourism and the promotion and establishment of a new quality of mutual understanding and co-operation between culture and the tourist industry.

Tasks of the co-operation platform include the following:

- Development of the strategy and organisation of its implementation in key projects.
- Development and coordination of joint international marketing and sales efforts.
- Knowledge management with international involvement.
- Qualification.
- Innovation management.
- Promotion of a new relationship between culture and tourism.

Key projects for the implementation of the future strategy are the following:

- Co-operation platform Kulturtourismus Vorarlberg 2010+.
- Culture-oriented tourism brand Vorarlberg 2010+.
- Optimisation of the marketing system for culture tourism.
- Culture events and workshops to maintain a productive co-operation between culture and tourism.

- Development workshop for cross-over products.
- Programme for entering the nearby market of the international Lake Constance region.

Lessons learnt and evaluation

So far, no real evaluation has been carried out with regard to the direct and indirect impacts of the programme for the development and implementation of Future Strategy for Culture Tourism Vorarlberg 2010+. The information available to the authors of the report Vorarlberg Tourismus and to invent GmbH allows the following conclusions:

- Activation and involvement

The developers of the strategy succeeded in establishing and strengthening a high level of interest among important representatives of the culture and tourism sector, new perspectives, and the fundamental willingness to participate in the implementation of the jointly prepared Future Strategy for Culture Tourism Vorarlberg 2010+.

- Commitment to national marketing co-operations

The programme has contributed significantly to the active participation of Vorarlberg's tourism and cultural institutions in the creation and establishment of national marketing co-operations.

- Relationship between culture and tourism

The actual course of the programme confirmed its basic assumption that new qualities and possibilities in culture tourism can only be achieved through a new quality of mutual understanding of the different requirements and success constraints that cultural and tourism institutions are subject to. These necessary improvements of the understanding and confidence between the two can be promoted above all through a positive communication relationship between decision makers from the culture and tourism sectors.

The programme and the developments in Vorarlberg which followed it have intensified the relations between tourism-relevant cultural organisations and tourism organisations, and have improved the conditions for useful joint development and marketing projects. The understanding of the different development reasons and success

requirements in the tourism and culture sectors is also likely to have improved.

- Joint confidence-building projects

Joint project plans that bring partners closer together because they are of mutual benefit and mobilise existing synergy potentials between culture and tourism were in some cases implemented, or at least envisioned with a genuine intention to implement them. The confidence basis between partners from the culture and tourism sectors that are relevant for culture tourism is likely to have improved as a result.

- The cultural character of the Vorarlberg tourism brand

A confidence-building practical example for the new development quality is the new positioning of the Vorarlberg tourism brand, which has assumed a strong cultural character, thus also improving the image of Vorarlberg as an arts and culture location.

- Network and co-operation platform “Kulturtourismus”

It can be said that this strategy project and the development it has triggered have expanded and intensified the social links between the partners and institutions from the tourism and culture sectors that are of relevance for culture tourism. The result is a loose network for culture tourism that is, however, increasingly useful for initiating new projects. The aim of the Kulturtourismus co-operation platform co-ordinated by Vorarlberg Tourismus is to strengthen and co-ordinate this network.

This institution for network coordination and development facilitation, however, has remained at a relatively non-binding and loose informal organisational level, and can therefore fulfil the functions intended for it only to a certain degree.

- Official recognition of the strategy by local level institutions

The new culture tourism strategy has played a significant role in the new brand positioning for Vorarlberg’s tourism, and has provided the corresponding drive for innovation. The 2010+ culture tourism strategy has also been integrated in the 2010+ model for tourism in Vorarlberg as a whole, and thus exerts an influence on the respective strategic focus. The culture tourism strategy, however, has received less official attention and recognition on a provincial and municipal level. As a result, it is not yet possible to establish the necessary practical

cooperations between culture and tourism on a provincial level and launch implementation projects with the corresponding strategic focus.

- Further opportunities for implementation

Without an improvement of the still informal organisational level of the co-operation platform and without greater recognition by the cultural institutions on a provincial level, it is hardly possible to achieve any significant increase in the implementation speed or the success of the Future Strategy for Culture Tourism Vorarlberg 2010+. Unfortunately, despite sufficient interest from a critical mass of players, the entire programme runs the risk of finally achieving only little success due to a lack of a critical mass of specific implementations.

Notes

1. Amt der Vorarlberger Landesregierung: Leitbild 2010+ Wirtschaft Vorarlberg.
2. BAK Basel Economics: Tourismus Benchmark Studie für das Bundesland Vorarlberg – Schlussbericht i. A. des Amtes der Vorarlberger Landesregierung, Basel, September 2005.
3. MARS Monitoring the Alpine Region Sustainability; INTERREG IIIB Alpine Space Project.

Chapter 8. Temple Stay Programme, Republic of Korea

Introduction

Theme-based tourist attractions are enjoying increasing popularity, particularly as a means of diversifying the tourist product and adding attractiveness to local territories (Gregs, 1996). A differentiated theme may capture the attention of potential visitors and may become an attraction in its own right if it is presented and interpreted well and is coupled with services that meet visitor requirements. Cultural tourism can be one of theme-based tourist attractions. The development of tourism has been traditionally related to the development of culture. The unique cultural resources of a territory serve as a basis for the cultural supply required by the local community, as well as contributing to increased tourism attractiveness.

Puczko and Ratz (2007) suggested that, as tourism products, cultural resources have several characteristics that ensure a unique role for this type of product in the development of tourism, because they can:

- Be developed with relatively small investment.
- Diversify and spread demand for tourism in time and especially in space.
- Contribute to the utilisation in tourism of unexploited resources.
- Develop new segments of demand for certain types of tourism (*e.g.* cultural tourism, heritage tourism, etc.).

As a cultural resource, the Temple Stay Programme is a good example of a theme-based tourist attraction. It is a cultural experience programme designed to help visitors understand Buddhism in Korea better and contributes to enhance attractiveness and competitiveness of local territories as cultural tourism resources. In this sense, the project focuses on introducing the best practice among Temple Stays in Korea, identifying successful factors for enhancing destination competitiveness, and suggesting

strategies and policy recommendations, as well as proving lessons learnt by the public actors and others.

Background

A Temple Stay is a cultural-experience programme designed to help people understand Korean Buddhism better. Temple stays offer various kinds of practicing methods such as *yebul* (ceremonial service involving chanting), *chamseon* (Zen meditation), *dahdoh* (tea ceremony) and *balwoo gongyang* (communal Buddhist meal service). Participants can find their “true self” amongst the harmony of nature while staying at a temple. Temple Life, the experience of temples is another programme designed to help people understand Korean Buddhism and the life of monks better.

Buddhism arrived in Korea over 2 500 years ago from China, absorbed some of this country's early shamanistic beliefs and evolved into a distinct form. Early Korean monks, convinced that the beliefs coming from China were inconsistent, developed a holistic approach involving three elements: meditation, studying sutras and chanting.

That balance between the three elements of Buddhist practice still exists, and has an appeal to many foreigners.

Typology of the programme

An innovative programme that is opening up Korean Buddhism to the world is the temple stay programme organised by the Chogye Order. Since it started in 2002, at least 6 000 foreigners as well as more than 30 000 Koreans have stayed at the 44 temples in the programme. The number of participants is increasing dramatically. In the first year of its operation less than 1 000 foreigners participated in the programme. In the first seven months of this year, more than 2 000 have already participated. The programme offers visitors a chance to sample monastic life amongst the artifacts, treasures and cultural memories housed in Korea's ancient monasteries. Most participants find it an enriching experience. Korea's monasteries are usually in mountainous, tranquil areas so participants have the chance to look inside themselves.

The programme is not perfect but each year the monks and nuns of participating monasteries gain more experience and learn more skills. An unplanned benefit of the programme is that foreigners return home with a new view of Korea. Because of the Korean War and tensions with North Korea, foreigners often have a one-sided view of the country that changes after their temple stay. They leave with a new perspective of Korea, a new

understanding of Korean Buddhism and perhaps a better understanding of themselves.

The programme has grown swiftly over the last six years from 14 temples to 72, with 69 280 participants in 2007. Currently there are 72 temples participating in the programme nationwide. The basic 24-hour programme (including one overnight) can be simplified to a half-day programme (3.5 hours), or be extended to three- and four-day experiences. Six temples are always open to individual participants while groups may make reservations at any temple all year long.

Major activities in the programme include attending the Buddhist ceremonial service, Seon (Zen) meditation, tea ceremonies that elevate one's meditative efforts, Buddhist meals with traditional bowls, community work and informative tours around the temple grounds, forest meditation to maximise oneness with nature, and hikes to nearby hermitages. Some temples offer special training programmes in Seon (Zen) meditation and Buddhist martial arts, lotus lantern-making, prayer bead (rosary) making, and other activities.

Most temples participating in the programme are located either in national or provincial parks which feature well preserved natural environments. Thus, the programme provides participants with an opportunity to relax, reflect and revitalise themselves in the tranquillity of nature.

The Temple Stay is a cheap and stress-free vacation, with all meals, clothing and housing provided, and is organised around a planned schedule. While for some this may sound like signing up for military training for the weekend, it is the ideal environment in which to simply let go of everything and relax. When guests arrive at a temple, they first change into a comfortable uniform. The schedule allows for participants to take part in temple activities alongside the monks or nuns, such as meals, bowing, and chanting. Other activities include hiking, a tea ceremony, martial arts, and Seon meditation. While the monks will not coddle guests while guiding them through various forms of bowing, chanting and eating the traditional four bowl meal which is a part of some Temple Stays, they have always been free and open when it comes to answering any questions. Rich with legend and tradition, the Seon, or Zen School is known for its simple approach, and its belief that people can walk the path to awakening with a minimum of accessories. While certain aspects may be emphasised in different temples, the benchmarks of Seon Buddhism are meditation and Hwadu, or Koan practice.

Temple Stay has huge potential to be a competitive tourism product as a cultural resource, attracting visitors to local areas in Korea. It creates a

positive image for the Korean tourism destination as well. In particular, Temple Stay can be one of sustainable tourism, keeping three principles in cultural tourism development: environmentally-sound, socio-culturally identifiable, and economically viable.

The Korean government has been promoting Temple Stay programmes actively as a differentiation strategy to enhance attractiveness and competitiveness. The Korean government has supported this programme with a Tourism Development Fund¹. In 2007, more than KRW 1.5 billion was provided to promote the Temple Stay programme, including development of infrastructure (such as accommodation facilities, roads, toilets, etc.), publication of promotional materials such as guide books, videos, magazines, FAM (familiarisation) tour, training programmes, etc. The Korean government will finance the Temple Stay programme for more than KRW 248.9 billion within a ten-year period for developing cultural tourism product as a cultural resource in Korea.

Survey on visitors' experience

A survey was conducted to investigate visitors' experience and perception of the Temple Stay. The purpose of the survey was to explore current situations of the Temple Stay and its potential as a cultural tourism product. A total of 360 foreign visitors responded to self-administered questionnaires from October to December 2007.

From the respondents, 151 were male (41.9%) and 205 were female (56.9%). In terms of civil status, 223 (61.9%) indicated they were single while 133 (36.9%) stated they were married.

With respect to religious distribution, 84 (23.3%) were Catholic, 79 (21.9%) indicated "Other", 71 (19.7%) had no religion, 60 (16.7%) were Christians, 22 (6.1%) were Buddhists and 3 (0.8%) were Muslim.

Regarding the nationality of visitors, the largest group was from the U.S. (19.7%), the second largest was from Canada, and the third largest was from Germany (8.9%). Other participants were from France and the U.K. (6.4%) and participants from the Czech Republic (4.4%).

The survey showed that the foremost motivations for participating in the Temple Stay programme were to "experience Korean Traditional Culture (Buddhism)" (55.8%) followed by "interest in Buddhism" (21.1%) and "desire to have an opportunity for self-reflection" (5.8%) (Table 8.1). The motivations which were ranked second were the "desire to have an opportunity for self-reflection" (15%), "interest in Buddhism" (13.6%) and to "experience Korean Traditional Culture (Buddhism)" (13.6%).

Table 8.1. Motivations for selecting the Temple Stay Programme (%)

ITEMS	1ST MOTIVATION	2ND MOTIVATION
Experience Korean Traditional Culture (Buddhism)	55.8	13.6
Have leisure time in Temple	2.5	6.7
Interest in Buddhism	21.1	14.7
Escape from daily routine	2.8	6.4
Leisure time for relieving tension and fatigue	1.4	4.2
Desire to have an opportunity for self-reflection	5.8	15.0
Appreciation of beautiful scenery	1.1	8.3
Interest in religion, philosophy	8.1	17.2
Others	0.6	5.8
No answer	0.8	8.1
Total	100	100

Regarding barriers to participate in the Temple Stay Programme, the survey showed that a large portion of respondents were prevented from participating in the Temple Stay because of lack of time (40%), followed by lack of information (29.2%), inconvenient transportation (9.2%), religious reason (7.8%), and economic reason (3.1%) (Table 8.2).

Table 8.2. Barriers to participate in the Temple Stay Programme (%)

BARRIERS	NUMBER	PERCENTAGE (%)
Lack of time	144	40.0
Lack of money	11	3.1
Inconvenient transportation	33	9.2
Lack of information	105	29.2
Religious reason	28	7.8
Others	23	6.4
No answer	16	4.4
Total	360	100

Most respondents expressed benefits from the programme: “new cultural experience (Buddhism)” (54.2%), “understanding Korean traditional culture” (9.2%), “opportunity for self-reflection” (7.8%), and “enhancing interest in Buddhism” (7.5%) (Table 8.3).

Table 8.3. Benefits from the Temple Stay Programme participation (%)

ITEMS	1ST BENEFIT	2ND BENEFIT
New cultural experience (Buddhism)	54.2	8.3
Understanding Korean traditional culture	9.2	28.6
Enhancing interest in Buddhism	7.5	13.9
Understanding tourist destination around temple	-	1.1
Leisure time for relieving tension	1.1	5.8
Opportunity for self-reflection	7.8	13.6
Appreciation of beautiful scenery	2.8	8.1
Others	4.3	2.8
No answer	13.1	17.8
Total	100	100

A survey on the potential of Temple Stay to be developed as a travel destination for cultural experience (Table 8.4) showed very positive results as shown in the following table. More than 79% of respondents expressed that the programme has high potential to be developed as a cultural tourism resource.

Table 8.4. Development potential as a travel destination for cultural experience

ITEMS	NUMBER	PERCENTAGE (%)
Never	5	1.4
Seldom	3	0.8
Neutral	45	12.5
High	163	45.3
Very high	124	34.4
No answer	20	5.6
Total	360	100

A survey on the potential of the Temple Stay programme to be developed as a travel destination for the place for mental recreation showed 4.16 points, high potential based on 5 point Likert scale. 40% of the respondents were neutral and 35.6% marked “very high potential” (Table 8.5).

Table 8.5. Potential as a travel destination for the place for mental recreation

ITEMS	NUMBER	PERCENTAGE (%)
Never	3	0.8
Seldom	5	1.4
Neutral	54	15.0
High	144	40.0
Very High	128	35.6
No answer	26	7.2
Total	360	100

A survey on the potential of Temple Stay programme to be developed as a Korean traditional cultural experience recorded the highest potential with 4.21 points out of 5 point Likert scale. 45.3% of the total respondents expressed that the Temple Stay has high potential (Table 8.6).

Table 8.6. Development potential as a Korean traditional cultural experience

ITEMS	NUMBER	PERCENTAGE (%)
Never	2	0.6
Seldom	3	0.8
Neutral	43	11.9
High	163	45.3
Very High	126	35.0
No answer	23	6.4
Total	360	100

The result of a survey on the potential of Temple Stay programme to be developed as a family-oriented travel product with educational purpose (Table 8.7) also showed positive results.

Successful factors and lessons learnt

The Temple Stay is a unique cultural resource, which over a relatively short period of time has gained iconic status in the Republic of Korea and progressed both the concept of Buddhism and its host territories.

Table 8.7. Potential to be developed as a family-oriented travel product with educational purpose

ITEMS	NUMBER	PERCENTAGE (%)
Never	9	2.5
Seldom	52	14.4
Neutral	120	33.3
High	93	25.8
Very High	59	16.4
No answer	28	7.5
Total	360	100

The success of the Temple Stay demonstrates how an entrepreneur with a creative way of thinking in developing cultural tourism products and innovative problem-solving can build a dream into a reality. The resulting relationship between tourism and Temple Stay is mutually beneficial. The Temple Stay provided insight into how innovative partnership between the government and religious organisations can work to create attractiveness of the destination.

There are various ways in which public-private partnerships can be formulated because the nuances of the particular contributions of public sectors and private organisations will be dictated by circumstances unique to each context. However, public-private partnerships can be classified into three major categories and these provide the framework for the development of cultural tourism resources by such partnerships.

The first major category consists of joint ventures in which the public sector plays the dominant role in developing new cultural tourism facilities. The second type of partnership is that in which the public sector engages in pump-priming to facilitate new cultural tourism development. The third category comprises situations where the public sector uses existing cultural resources owned exclusively by the private organisation. The public sector's contribution either entices the private sector to make their cultural resources available for public use or improves the prospects of such facilities to be attractive.

These three categories may be conceptualised as being on a continuum that reflects the magnitude of the public sector's cultural resource commitment and involvement. This increases if the public agency assists the development of cultural resources through pump-priming and is maximised in joint developments with the private organisations.

Key benefits commonly derived from the public-private partnership are (Poetschke, 1995):

- Reduced antagonism between the public and private sectors.
- More effective use of resources (money and time).
- Avoiding duplication.
- Combined areas of expertise.
- Increased funding potential.
- Creating a “win-win” situation.

In this perspective, the Temple Stay increases the private religious organisation's capability to enhance attractiveness of religious sites as tourism destinations by introducing public funds, technology and human resources, thus contributing to economic benefits for the local territories. It also supports private religious organisations through public capital and administrative support, thus overcoming shortages of investment capital and upgrading credibility.

This public and private partnership for developing cultural resources as cultural tourism products or destinations is rapidly becoming essential to being competitive in today's global tourism industry. It is particularly relevant to the development of cultural tourism, given their relatively isolated situation and often smaller financial resources, to overcome the unique challenges from other tourism resources.

In addition, marketing should be considered as an integral element in the planning and management process adopted for the Temple Stay programme. In doing so, however, one must think strategically about the Temple Stay product, its market, and effective positioning as a cultural tourism resource. No cultural tourism product, nor any product for that matter, can be everything to everyone.

One of the biggest mistakes of inexperienced managers in Temple Stay is to assume that the Temple Stay programme or experience has universal appeal. Because of this belief, managers in the Temple Stay embark on a series of unfocused promotional activities that send out unclear messages aimed at no one in particular.

It is essential for temples receiving significant numbers of visitors to address the latter's needs by providing necessary facilities and services. The

planning and development of facilities and services need to be well considered, as undue “commercialisation” will detract from the conservation/preservation and presentation of the temple and its overall aesthetics. The conservation of the historic temple buildings and character and authenticity of the temple are thus seen as influences on visitors’ expectations.

Operational plans should aim to anticipate and pre-empt problems. In many cases, services, such as hospitality operations, provide invaluable revenue flows; therefore, to maximise benefits these should be of good quality with attentive customer service. Within this context, management should adopt and promote environmentally-friendly practices and encourage visitors to behave accordingly. There should be a clear environmental policy and an environment management system in temples, an approach that could be part of the marketing strategy.

Conclusion and policy implications

Temple Stay is a truly unique and special type of accommodation that offers the opportunity for tourists to stay overnight in a Buddhist temple. It is recognised, however, that the main obstacles to develop the Temple Stay as a cultural tourism are “inconvenient and old accommodation facilities in temples”, “lack of convenience facilities”, “lack of efficient guide system”, and “lack of skilled human resources”.

In order to enhance attractiveness of the Temple Stay as a cultural resource, close collaborations are essential. The government, private religious organisation (Jogye Order of Buddhism in Korea), and other private expert organisations in terms of operational excellence should be involved in developing cultural resources efficiently and effectively. Above all, the central government (Ministry of Culture, Sport and Tourism) should establish a relevant long-term plan to develop the Temple Stay programme as the most attractive cultural tourism product in the world. The programme should also benefit from private expertise in terms of operation and management.

There are a number of strategies to develop the temple resources into cultural tourism attractions:

First, it is to build a convenient, clean, and comfortable infrastructure including accommodation facilities, meditation places reflecting the traditional cultural spirit, and restaurant facilities to experience Buddhist food, etc. The government’s role is to finance the construction of this infrastructure. In fact, the Korean government plans to invest more than

80% of the total cost of innovating facilities, while religious organisations share about 10% of finance.

Second, it is to bundle available cultural attractions around temples to create a themed set of attractions that collectively constitute a primary attraction. According to McKercher and du Cros (2002, p. 112), “bundling is common in tourism, with the packaged tour representing a prime example. Airfare, accommodation, ground transport, and a variety of other services are combined to create a new product. Bundling, within a cultural tourism context, typically involves combining a variety of similarly themed products and experiences and promoting their collective consumption to the visitor.” The Temple Stay should be bundled with other tourism assets that exist in local communities. In this way, the economic benefit of cultural tourism is dispersed more widely. More important, bundling helps create a theme for a place, creating a stronger sense of destination for the tourist by invoking many places with similar meanings (McKercher and du Cros, 2002). In line with this implication, community involvement in the development and sustainability of cultural tourism should be made.

Third, it is very important to foster skilled human resource for the Temple Stay. The programme for training the guide should be provided by the public and private sectors. The Temple Stay guide is an individual who helps domestic or foreign tourists with cultural experiences by explaining them and imparting an accurate understanding of Korean Buddhism and cultural relics and local culture. The programme aims to recruit and train Temple Stay guides to satisfy the demand related to tour packages, including cultural experience products and the facilitated discovery of historical relics, rather than the simple experience of the temple.

The demand of both Koreans and foreigners for cultural tourism products have diversified as their travel experiences have increased. To accommodate new high value niche markets, the Ministry of Culture, Sports, and Tourism has established a guide plan in co-operation with religious and educational organisations and trains the guides and volunteers at selected local colleges or museums in various municipal and provincial areas.

Moreover, innovated programmes and information network should be provided. For these efforts, public-private partnership (PPP) is essential. Through the PPP, a step-by-step strategy should be adopted from building infrastructure through enhanced awareness of the Temple Stay to globalisation.

In conclusion, the Temple Stay Programme as a cultural attraction in qualitative environmental settings creates a destination’s distinct profile and generates visitors. Temple Stay Programme is a cultural asset to enhance

attractiveness of local territories, contributing to the national tourism improvement in terms of the provision of cultural richness, diversification and differentiation of tourism resources, and suggestion for best public-private partnership. Sustainable tourism management, enhancement, interpretive management and constant monitoring of temples and heritage assets should be major tasks for temple managers, public sectors and local communities.

Note

1. The Tourism Promotion and Development Fund has emerged from the Tourism Promotion Fund Law that was passed in 1972. The purpose of the fund is to secure more capital for the growth of tourism industry. The Fund supports the construction of basic tourism facilities, construction and renovation of overall basic facilities, the development of accommodations and resort business, and for research activities that contribute to balanced tourism industry development.

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Chapter 9. State of Michoacán, Mexico

Introduction

Mexico and the State of Michoacán share with most developed countries an appreciation of cultural resources as factors for development. When Mexico's Secretary of Tourism decided to diversify tourism development, not only by promoting sunny beach resorts, but by supporting the touristic development of sites that have a rich cultural heritage, tangible and intangible, the government of the State of Michoacán was ready to make the best of this opportunity. Michoacán is an entity that has worked to preserve its cultural heritage; and it values the force and worth of its resources as a first order tool to plan its own model within a State policy.

The State of Michoacán's tourism policy entails the development of a new and functional model for cultural tourism, which intends to give touristic value to the rich historical and architectural heritage, together with the natural environment, where towns, rural villages and indigenous communities develop. This tourism prototype is avant-garde in the country and is based on sustainability, because it fosters economic, social and cultural development for the citizens of these towns, while generating the commitment of all actors to preserve the environment and all cultural processes.

To make this cultural tourism project viable, the government of the State has designed a strategy to build new cultural products that are competitive and capable of attracting visitors who look for new experiences: visiting sites with historical-cultural value; being in direct contact with the people who live in calm places in total harmony with Nature; experiencing an interaction with craftsmen in their workshops and learning how to manufacture diverse pieces of craftsmanship; participating in traditions, customs and fiestas; and tasting the rich traditional gastronomy in an atmosphere of hospitality.

Origin of the case

Location and dimensions of Michoacán

Michoacán is one of 32 states in the Mexican Federation. It is located in the centre west of Mexico and its territory measures 60 000 km², twice as large as that of countries like Belgium or the Netherlands. Its coast line stretches 213 km along the Pacific Ocean.

Michoacán's territory includes mountain ranges, plateaus, plains, rims and coasts. Altitudes range from sea level, along the coastline, to 3 840 metres above sea level, in Tancítaro's peak.

There are plenty of thermal fountainheads in the east and centre-north of the state and it has a most pleasant temperate climate.

Population

The State of Michoacán is composed of 113 municipalities with a total of 4 017 115 inhabitants (INEGI, National Statistics Institute of Mexico 2005). 2.5 million people from Michoacán have migrated to the U.S. in search of work.

76% of the people live in cities and 24% in rural areas. Michoacán's population is mainly half-bred; however, three ethnic groups find their roots in the State: Náhuatl (coast), Otomí (east) and P'urhépecha (centre). The latter, being the majority, has given the state an identity, because of its remarkable language, *p'horé*, and special artistic attributes and craftsmanship.

The P'urhépecha region covers 17 municipalities and more than 100 communities, where 92% of the Indian population of the state lives.

Infrastructure

Michoacán has an International Airport in the capital city of Morelia that receives 139 weekly flights from Mexico City and abroad. International flights come in from San José, Los Angeles, Ontario, Chicago, Sacramento, Houston and Seattle. International flights have connections to different countries in Europe and Asia.

The entity has a network of roads of 12 885 km. Outstanding among them are modern freeways in the west (Mexico City – Morelia - Guadalajara), the one from Morelia to Salamanca, and 21st century freeway (Morelia – Uruapan – Lázaro Cárdenas).

Regarding touristic infrastructure, Michoacán has 500 hotels and approximately 15 000 rooms for accommodation, as well as 385 restaurants, bars, cafeterias and night clubs. 5% of the rooms are in five star hotels, 23% are classified as four stars and the rest have three or less stars.

Productive activities

The main productive activities of the state are: services, tourism, agriculture, industry and cattle-raising, forestry, crafts and commerce.

In agriculture, Michoacán holds the first place in the country in the production of avocados, strawberries, raspberries, guavas and grapefruits. It also has forests occupying 42 000 km², wherein there are 42 protected areas, seven national parks and three sanctuaries.

Michoacán is one of the states with the largest development of crafts in Mexico, having a significant production of copper, carved wood, basketry, ceramics, lacquer and string instrument-making, among others.

Michoacán has a great potential as a touristic destination because of its cultural and natural resources: fine weather, soil, water, vegetation, communications infrastructure, roads and services. The state is divided into seven tourism regions: Centre (Morelia), the Lakes (Pátzcuaro), the Plateau (Uruapan), East (Zitácuaro), West (Zamora), Coast (Lázaro Cárdenas) and Warm Lands (Apatzingán).

Successful development of tourism in Michoacán

The government of Michoacán is developing a policy to foster tourism together with municipal governments and businessmen in the sector, and this has resulted in substantive growth in touristic indicators during the past years (2002-07):

- The number of visitors has doubled: in 2002, there were 3.4 million visitors and in 2007, there were more than 7 million.
- The number of international tourists also increased, from 104 000 to close to 1.1 million.
- The average annual hotel occupancy also grew from 44% to 66%.
- The stay of tourists increased from an average of 2 nights to an average of 3.5 nights.

- The daily expense of domestic visitors was 42 dollars a day, and by 2007 it increased to 60 dollars. In turn, daily expenses of international visitors were over 90 dollars.
- The economic earnings from all tourists coming to the state accounted for 271 million dollars, and 1 265 million dollars in 2007.
- In total, touristic businessmen created more than 40 000 jobs in this period.

Cultural resources

Michoacán's cultural resources are tangible and intangible, key elements in its villages and communities. The present value and significance of this heritage, from the tourist's point of view, is related to the role that Michoacán has played in the history of Mexico. The quality and artistic value of these resources lies on the state of conservation of the built heritage and on the validity of centennial cultural expressions; that is, a living and dynamic culture. This cultural wealth is a source of pride for the communities and gives them a sense of belonging and identity while providing viability for the future.

Among the many cultural resources found in Michoacán, the following are outstanding: the sites of *Yácatas* (round pyramids) in Tzintzuntzan, the pyramids of Ihuatzio, Tingambato, San Felipe de los Alzati, Tres Cerritos de Cuitzeo and Huandacareo. There are also monumental buildings from the times of the Viceroyalty, such as the aqueduct, ex-convents, churches, museums, big houses and ex-haciendas in various parts of the State. There are also five remarkable cathedrals: Morelia (the tallest in America), Pátzcuaro, Zamora, Tacámbaro and Apatzingán. There is a network of hospital-villages in the Purépecha plateau: these were built by Vasco de Quiroga, a humanist who was in the area in the 16th century and founded these villages for the Indians to live in and learn different crafts and working techniques. Hospital-villages have chapels from the 16th and 17th centuries that lodge beautiful altar pieces and story-telling ceilings created by skilful indigenous craftsmen. Among these, working tools for the development of trades, garments and, in general, the environment and objects that make life possible in the communities.

Non-material cultural resources include: the *p'orhé* language and the social organisation of work and government in the communities (Council of Elders); the customs, celebrations and traditions, as well as the rights and duties of the members of the communities. Also, knowledge, skills and

technologies designed in consonance with the environment, aimed at satisfying the needs of the community. Essential also are the forms of symbolic expression and the sense of aesthetics expressed in folk art: dance, music, gastronomy, literature, painting and sculpture, among others.

Based on the cultural and natural resources of Michoacán, a project for integral development has been launched. This is aimed at the creation of jobs, economic growth and people's welfare, and its principal actions are to:

- Draw a set of cultural-touristic maps for Michoacán in order to have accurate information about all resources that are part of our heritage.
- Make street plans of towns and villages with touristic potential, so that they grow in an environmentally friendly manner.
- Act, together with groups from civil society, in the restoration of our architectural monuments, cultural centres, plazas, ex-convents, churches and works of art, in order to give them all a touristic value.
- Give support to Morelia, Cultural Heritage of Mankind, to strengthen its splendour and touristic attraction.
- Consolidate Pátzcuaro, Tlalpujahuá and Cuitzeo within the National Plan of Magic Towns.
- Strengthen the urban image of communities: street cobble stones and remodelling of atriums, plus restoration of house façades in the historical areas downtown.
- Work jointly with other agencies, through a transversal policy, in order to promote works of basic infrastructure: roads, drinking water, electrification and housing.
- Develop hotel and restaurant infrastructure through a sustainable policy based on continuous improvement systems plus touristic quality.
- Support sustainable projects whose basis is cultural creativity and respect for the environment.
- Build and promote Michoacán's restaurants in order to provide tourists with healthy traditional food in clean environments.

- Promote the training of tourist guides who are knowledgeable about hotels and restaurants that offer high quality services.
- Develop cleanliness campaigns in freeways, streets and access ways to touristic destinations.
- Set up regional landfills and to promote an environmentally friendly culture, so as to prevent environment pollution and degradation.

Parallel with above-mentioned actions, other activities with high cultural impact have been developed: International Festivals on Music, Organ, Guitar and the Cinema, held every year in Morelia, the capital city; and the Festival and Cultural Purhépecha Contest of Zacán, which gathers more than 100 communities and 600 indigenous artists in music, dance, singing and composition.

One sample of the significance of these cultural touristic events is Morelia's International Music Festival. This Festival was created in 1989, with the intention of establishing a centre to encourage the dissemination and teaching of music, similar to the Festival of Salzburg.

The Music Festival chose Morelia as its venue because America's first Music Conservatory was founded in this city in 1743. Morelia is also the home town of a children's choir of international renown.

Morelia's Festival has been the meeting point for the greatest composers in the world, and of the best instrumentalists from countries like Denmark, Argentina, Cuba, Australia, Japan, Brazil and Mexico. Some of the orchestras, ensembles and choirs included in the programme are: Mexico City's Philharmonic Orchestra, Mexico's National Symphony Orchestra, Munich's Pro Arte Orchestra, the Schola Cantorum Cantate, the Ambassadors' Choir, Ars Antiqua, Mexico's National Choir and the Orfeón Donostiarra, among others.

In November every year, the International Music Festival invites one country to send a representative of its artistic and musical culture: Italy (2002); Spain (2003); Japan (2004); Brazil (2005); Cuba (2006); the European Union (2007) and the Argentine Republic (2008).

Approximately 30 concerts take place every year with the participation of close to 700 musicians and with the attendance of 30 000 spectators.

Because of this, cultural tourism is undoubtedly a good alternative for the development of Michoacán. It is a tool that helps make the best rational use of its cultural resources, based on a policy including guidelines, strategies and long, mid and short-term actions, while seeking to abate

marginality and poverty in the State caused by unemployment, migration, illiteracy and deforestation.

Characteristics of cultural touristic destinations

Challenges

Notwithstanding the fact that Michoacán has a vast touristic potential, expressed in its rich natural and cultural resources, paradoxically, it falls behind in some rural and indigenous areas and this has prevented it from reaching higher levels of development.

The most important opportunity areas to be attended by the tourism sector are the following:

- Improvement and broadening of the infrastructure and supply of services (hotels, restaurants, transportation, information, guides, toilets, etc.).
- Professionalisation of human resources in tourism services by means of training programmes on tourism quality.
- Improvement and broadening of transportation and creation of efficient signal systems.
- Cleanliness and maintenance of freeways, roads and access to touristic villages.

Another problem in the state is the large migration to the U.S. of young people and adults in search of employment. Because of this, there are communities where the majority of the population is composed of women and the elderly. Tourism activities are thus an opportunity for the development of these people and the communities, by establishing small and medium-size businesses in fields such as gastronomy, lodging and sale of crafts.

Intervention of the government

In view of these circumstances, a joint strategy has been designed which encompasses three levels of government: federal, state and municipal, plus the businessmen in the sector. It is aimed at undertaking co-ordinated actions and investments that take full advantage of natural and cultural

resources in a sustainable manner to generate economic growth and social development in the communities.

To this end, 13 federal ministries and government agencies and 12 state agencies related to the sector are part of an overall project with actions of high social impact and sustainable and efficient use of resources.

Having this objective in mind, federal and state agencies are working in a co-ordinated way on the following topics: elaboration of city tourism development plans for the towns; improvement of the urban image of the communities; underground cables in historical centres and lighting of emblematic buildings; development of basic infrastructure (potable water, electrification) in the most backward communities; signs in freeways, roads and touristic destinations; improvement of houses; funding of small and medium touristic businesses (building restaurants and hostels), training of service providers and promotion and dissemination of touristic products and destinations of Michoacán.

The cultural tourism model for Michoacán has achieved continuity as a state policy, beyond the duration of the period of administration of the state government.

Typology of programmes

Revitalisation of touristic destinations

The government of the state has worked jointly with civil society in Michoacán in order to rescue and revitalise the cultural heritage in buildings. Such is the case of the association “Adopt a Work of Art”, which has undertaken exemplary actions to recover and conserve these goods with absolute respect for the communities, the environment and cultural processes.

An example of this significant work in Michoacán is the restoration of the chapel in Tupátaro, which has a unique coffered ceiling and an altar piece of the 16th century. Also in the P’urhépecha plateau, “Adopt a Work of Art” restored ceilings, altar pieces and images in churches and chapels of the 16th and 17th centuries.

In Tzintzuntzan and Cuitzeo, restoration works are under way in two former convents of the 16th century, Franciscan and Augustinian, respectively, to use them as cultural sites.

In Morelia, the Templo de las Rosas and the Chapel of Saint Augustine were revitalised; the latter has an art gallery including admirable frescoes and religious works of art.

With the support of the federal government and the city councils, important actions have been undertaken in the three magic towns of Mexico (Pátzcuaro, Tlalpujahua and Cuitzeo) and significant investments have been made to remodel the plazas, gardens, portals, streets and pavements of the historical centres and building market places to relocate street vendors.

In the villages of the P'urhépecha plateau called Angahuan, Zacán and Paracho, actions to improve the urban image are also underway: remodelling the porticos, replacing cobble stones in the streets, restoring the portals and rebuilding the roofs.

Businessmen from Michoacán have invested in the restoration and good use of buildings from Viceroyalty, transforming them as hotels, restaurants, shops, etc.

Impact of the actions on touristic destinations

All these actions that have been described are aimed at increasing the level of satisfaction of visitors to Michoacán. At the same time, it prevents the deterioration or loss of the original physiognomy of buildings or architectural monuments, as well as the cultural identity of the communities.

The villages are taking part in the planning and implementation of the projects, in the environmental impact studies, the cleanliness campaigns of tourist destinations and the surveillance of protected natural areas.

Image promotion

A new strategy to divulge and promote the image of main touristic-cultural destinations through printed materials, audiovisuals and the Internet has been launched.

Information materials, such as maps, guides, pamphlets, posters, brochures and spectacular signs have been created. In addition, 17 000 copies of five large coffee table books have been printed. Michoacán's Secretary of Tourism has a portal with 40 000 visits a month seeking information on cultural tourism activities.

Michoacán participates in many international fairs and it has organised more than 200 familiarisation trips in the state. Two groups of 300 Spanish speaking and European Union youth have been welcomed to travel along the

Quetzal Route. As part of its marketing strategy, specialised media in different countries have been contacted.

Three touristic cultural products

The final part of this study involves three touristic-cultural products in Michoacán, where the strategies, objectives, methodologies and actions of the Model are implemented:

Don Vasco's Route

This route is called “Vasco de Quiroga” to pay tribute to the Spanish humanist from the Renaissance, who was considered protector of the Indians in ancient Michoacán. He carried out a formidable humanistic task in a privileged natural environment and his work was enlarged by teaching the people the trade of making beautiful crafts and productive activities.

The objective of Don Vasco's Route is to contribute, through sustainable tourism, to regional development and job creation and to fight poverty by the careful and responsible use of natural resources and cultural heritage.

When travelling along this route, the visitor may enjoy the natural environment while getting to know the most significant historical, social and cultural heritage and interacting with the dwellers of the communities.

The route covers an area of 6 220 km² and initially encompasses 15 municipalities and 40 villages. Eleven circuits have been designed in this area that will be gradually be developed in three stages: short term, 2007-08; medium term, 2009-10; and long term, 2011-12.

Circuits are designed according to the supply of touristic products: beautiful communities in the P'urhépecha lake area and plateau, with breath taking landscapes, beautiful islands and forest areas with conifers where the visitor may take rides along the lakes, rivers, volcanoes and waterfalls. Also, it is possible to visit the fairs and patron saint day celebrations and to participate in events such as the “Day of the Dead”, which for some Indian communities has a profound significance of loyalty and respect for the dead. Similarly, one can admire the rich and varied craftsmanship, taste the succulent dishes of the P'urhépecha cuisine, enjoy the tangible and intangible heritage and, more importantly, interact with the generous and hospitable people of the area.

Michoacán's traditional cooks

In order to give touristic value to the rich and varied gastronomy of the Michoacán State, the state government has organised four assemblies of cooks from Michoacán.

These events resulted from the participation of cooks in the crafts street market that has taken place in Uruapan for 20 years during the celebration of Palm Sunday. Succulent dishes, characteristic of the communities, are presented during this event.

During these traditional cooking assemblies, women from Michoacán exert their effort and use their talents and creativity to present delicacies to those who have gathered around them to taste their dishes.

Although it may be true that cooks are repositories of a cooking heritage orally transmitted from generation to generation, they have adapted to current times by innovating and improving the quality of dishes, both in presentation and taste, to feed body and spirit with delicious food.

Determined to contribute to the appreciation of its traditional cooking, Michoacán participated in the UNESCO project *Hombres de maíz* (Men of maize) with Mexico's ancient cooking; rites, ceremonies and practices. The book *Paranguas, hogar de manjares michoacanos* (Paranguas, the home of delicacies from Michoacán) was presented in Madrid in January 2006 during the International Tourism Fair and was awarded a prize.

Quality Club Programme: "Treasures of Michoacán"

This programme began nine years ago after an initiative of the state government and has as articulating axis the continuous improvement of quality in touristic services in hotels and restaurants.

With the participation of hotel and restaurant owners, the programme aims at helping small and mid-size family businesses implement quality management and continuous improvement systems, and create networks of businesses. This will result in trustworthy premises that no longer work in isolation but may collaborate to solve problems such as lack of professionalism, low hotel occupancy, and inability to deal with tour operators on an individual basis.

This programme has been very successful and maintains the established principles while complying with quality indicators, both in facilities and services provided. The following are the characteristics of the Quality Club Programme:

- All hotels are located in an urban environment of high cultural value; for example, the historical centre; or in a genuine natural space of Michoacán (landscapes, country or rural areas).
- They are in buildings of traditional architecture, thus preserving the essence and authenticity of things Mexican.
- Every premise has an individual who is permanently in charge of quality and of implementing management systems based on continuous improvement.
- Establishments belonging to this programme are subject to a rigorous annual analysis and control audit of installations, equipment, service and management, in order to improve and keep the set quality standards.
- By offering a large variety of dishes, restaurants promote Mexican and Michoacán gastronomy, and are bound to comply with hygiene certification through Emblem H.

Through the Quality Club Programme, a new business style has found its way in Michoacán. In the years of its existence, 60 new businesses have been established. Presently, the programme has 14 hotels and 12 restaurants facing the market which comply with quality levels required. Seven new hotels were created based on the programme's standards and five more are about to join. All are substantially increasing their infrastructure and clearly, their quality of services.

The programme has been so successful that the government of the state of Michoacán has shared its experience with other destinations that have similar features and which are now using this technology. Soon there will be a Quality Club Treasures of Mexico, with a vision and regional scope that may set forth a new culture regarding touristic services. States presently participating in the Quality Club Programme are Morelos, Chiapas, Guanajuato and Puebla.

Chapter 10. The Industrial Monuments Route of the Silesian Voivodeship, Poland

Introduction

This case study concerns the tourist attractiveness of the Silesian *voivodeship* area. It presents the local authorities' policy and activities undertaken to develop tourism in the region, more specifically, the work of the Silesian Tourist Organisation and Silesian *Voivodeship* Speaker's Office to create an attractive image for the Silesian *voivodeship*.

The main aim of the strategy is the promotion of the Silesian *voivodeship* as an attractive region. The stereotype of Silesia as a region of heavy industry is slowly being overcome by various publications, information in the media and presentation of its tourism potential at tourist fairs in Poland and abroad.

The Silesian *voivodeship* is a unique and diverse region:

- The north and south areas (the Krakowsko-Częstochowska Upland and Beskidy Mountains) are notable for their natural beauty and the potential for tourism development. The northern part (Jura Krakowsko-Częstochowska) has picturesque ruins of castles forming the Trail of Eagle Nests (castles in Mirów, Bobolice, Olsztyn, Ogrodzieniec, Będzin); the southern part (Beskidy Mountains) is considered a ski paradise (Ustroń, Szczyrk, Wisła, Korbielów) and has well-developed accommodation and catering facilities and ideal conditions for skiing and snowboarding (200 km of ski runs and 150 ski lifts).
- The central part has historic mines ("Ignacy" in Rybnik, Silver Mine in Tarnowskie Góry, etc.), palaces and museums such as the Museum of Bread in Radzionków, the Castle Museum in Pszczyna, the Tychy Brewing Museum in Tychy, the Duke's Brewery in Tychy, and the Silesian Museum in Katowice, which has one of the best collections of Polish paintings.

- Silesia has one of the biggest sanctuaries of the Virgin Mary in the world, Jasna Góra in Częstochowa, which is the spiritual capital of Poland. In the *voivodeship*, there is also the Upper Silesian Narrow-Gauge Railway in Bytom, the oldest in Europe, and a mining complex with a functional steam engine from 1915 (Open-Air “Queen Luiza” Coal Mining Museum in Zabrze).

The diversity of the region together with a well-developed infrastructure - good communication facilities, international airport, road and motorway network, and excellent accommodation and catering facilities - make the Silesian *voivodeship* a region highly attractive for tourists.

The important element in promoting the uniqueness and attractiveness of the region is the branding of authentic Silesian products. Regional organisations and local authorities co-operate in working out a strategy for tourism development. One such product in the Silesian *voivodeship* is the “Industrial Monuments Route of the Silesian *Voivodeship*” as industrial legacy constitutes an integral part of the cultural heritage of the region.

The project is aimed at raising attractiveness of the Silesian *voivodeship* through the creation of a new brand, namely the “Industrial Monuments Route of the Silesian *Voivodeship*”.

Background

Identity of the location and inventory of cultural resources

The Silesian *voivodeship* created in January 1999 is the fourteenth *voivodeship* in Poland in terms of the area (12 294 km²) and second in terms of population (4 830 000 inhabitants). The population density is 393 inhabitants per km², the highest in Poland. The Silesian *voivodeship* is located in the south of Poland and is divided into 19 city counties and 17 land counties which are further divided into 166 districts (*gminas*). There are 71 towns and 1 518 villages in the area. The capital of the *voivodeship* is Katowice (329 000 inhabitants).

The Silesian *voivodeship* is the most industrialised region in Poland. The Upper Silesian Industrial District comprises the industrial units in the central-east part of Upper Silesia and Dąbrowa Coal Mining Region. There are also several minor industrial districts around the bigger cities (Częstochowa, Bielsko-Biała). The Silesian *voivodeship* has natural areas (six landscape parks and 60 nature reserves) and diverse land form features (Jura Krakowsko-Częstochowska, Beskidy).

Numerous cultural events and international festivals are held in the *voivodeship*, e.g. the International Rawa Blues Festival, the LOTOS Jazz Festival “Bielska Zadymka Jazzowa”, and the International Church Music Festival “Gaude Mater”. Other events are the International Vocal Music Festival “Viva Il Canto,” the International Students Folklore Festival, the Week of Beskidy Culture, the International Brass Bands Festival “Golden Lyre” and the annual Silesian Cuisine Festival.

Issues related to the location attractiveness

Because of its geographical situation and natural resources, the Silesian region has been the object of numerous diplomatic and military actions by neighbouring countries throughout the ages. Silesia has become a multicultural region due to past changes in affiliation of this area (Polish, Czech, Austrian and Prussian).

Industrial revolution in the 18th century resulted in the creation and development of steel works and mines. The application of a steam engine to drain precious metal mines in Tarnowskie Góry and construction of the great coke-fired stove turned Silesia into an important European industrial centre where new investments increased the demand for workforce. Consequently, the influx of people resulted in the region becoming one with the highest population density. The rapid development of ironwork, glasswork and zincwork, as well as improvements in the land and water communication systems, transformed Silesia into a region of technical and industrial culture.

In recent years, the closure of numerous historical plants became necessary. It questioned the future of the region’s heritage. Working out effective forms of preservation and promotion of the industrial heritage is one of the aims of the strategy of regional and local development. This is how the idea of the “Industrial Monuments Route of the Silesian *Voivodeship*” came into being. This route is closely connected with the industrial legacy of the Silesian *voivodeship*.

The post-industrial areas, *i.e.* those remaining after the closure of industrial plants or belonging to the plants in the process of closure, occupy a considerable area of Poland (about 8 000 km²). It is estimated that about 4 000 km² within the Silesian *voivodeship* are polluted areas. Solving the problem of pollution would require the following:

- An information system about the polluted areas.

- A complex program of de-industrialisation, mostly through rational management which requires cleaning of polluted areas and transforming them according to the land development plan.
- The implementation of effective and environment-friendly revitalisation technologies.
- The revitalisation of the service sector (modernisation of buildings).
- The conversion of old industrial centres into tourist facilities.

The revitalisation of industrial areas gives an opportunity for development, as examples in the U. S. and European Union have shown. New work places will be created and these areas will acquire new value for potential investments. This will contribute significantly to the economic development of the *voivodeship*.

Tourism needs good infrastructure to work properly. Around Katowice the improvement of infrastructure and the creation of new shopping and business centres have resulted in a better image of the *voivodeship*. New communication networks are being created (Katowice International Airport), the road network is being modernised, the hotel and restaurant network and the shopping and entertainment centres are being developed.

All this has resulted in the transformation of the Silesian *voivodeship* into an area of great investment potential at national and international levels. The conversion of old industrial plants into tourist facilities contributes undoubtedly to innovation in tourism in the *voivodeship*.

Typology of the programme

Local authorities, tourism and social organisations participated in the development of the Strategy of Tourism Development in the Silesian *voivodeship* (2004-13).

Among the numerous cultural; natural and sports products proposed by the region, the “Industrial Monuments Route of the Silesian *Voivodeship*” is unique and is strongly related with the history, economy and culture of the Silesian *voivodeship*. It has the potential to become an international tourism product and the promotion of this route contributes to the popularisation of the cultural heritage of the Silesian *voivodeship*.

Attractiveness of the location

The economic development of the region through tourism might contribute to increase its attractiveness. The “Industrial Monuments Route of the Silesian *Voivodeship*” creates new value and constitutes a basis for regional identity and tourism development. This project supports the promotion of the region and also allows for the preservation and utilisation of the unique sites along the route.

This project allows for the creation of new work places and for change in the image of the region. As a consequence, it fosters new investment opportunities, which in turn will result in broadening of the tourist offer.

Competitiveness of the location

Tourism stimulates economic development, as shown by examples such as the Nord-Pas de Calais region in France or the North Rhine-Westphalia and Saarland in Germany. It has numerous direct and indirect economic impacts. In Silesia, for every ten accommodation places created, it can be assumed that around a hundred jobs (direct and indirect) could be generated. People who have lost jobs as a result of the closure of old industrial centres might find employment in tourism.

Main objectives

The official opening of the “Industrial Monuments Route of the Silesian *Voivodeship*” took place in October 2006. The “Industrial Monuments Route of the Silesian *Voivodeship*” is a thematic route which connects industrial heritage sites of the Silesian *voivodeship*. It includes the 31 most important and interesting, historically and architecturally, sites which have witnessed the industrial revolution.

The industrialisation of the region began in the 18th century which completely changed the image of Silesia. The landscape was modified by the chimneys of power stations, mine shafts and steelworks’ stoves. The remnants of those times are scattered all around the *voivodeship*.

The “Industrial Monuments Route of the Silesian *Voivodeship*” reflects the culture of the region allowing for the preservation and utilisation of unique sites. The route presents a wide range of sites and progressively, the route will develop and include new component destinations.

The idea behind the creation of the route was to cluster a wide range of sites to create new value. The route aims to:

- Create a branded tourist product on the basis of the most important and interesting (historically and architecturally) industrial sites of the region.
- Show the richness of the economic and cultural heritage of the *voivodeship*.
- Preserve the historic industrial sites.
- Promote a new image of the Silesian *voivodeship* and to overcome the “grey Silesia” stereotype.
- Show the monuments of techniques as unique nationally and internationally.
- Restructure and convert industrial sites into facilities for service, trade and business sectors.
- Encourage potential investments.
- Ease unemployment, *i.e.* creation of employment in former industrial plants converted into tourist facilities.

Programme features

The target locations are the 31 sites on the “Industrial Monuments Route of the Silesian *Voivodeship*”. The primary target group is composed of industrial tourism lovers and the secondary target group is composed of school children (educational school trips), students (history and technical faculties from Poland and abroad), scientists and their students, families with children (educational offer), business tourists from Poland and abroad interested in investments in the post-industrial areas and foreign tourists.

The Self-Government of the Silesian *Voivodeship* financially supported the project by developing its strategy, creating its logo and information boards, among others. The Ministry of Economy supports the Silesian Tourist Organisation while the Silesian *Voivodeship* Speaker’s Office supports regular trainings seminars.

The project was realised by the Department for Promotion of the Region, Tourism and Sport of the Silesian *Voivodeship* Speaker’s Office in

co-operation with the Silesian Cultural Heritage Centre and the Silesian Tourist Organisation. Priority has been given to promotion (*e.g.* tourism files, website www.gosilesia.pl/szt, road signs, marketing strategy).

In February 2008, the first offer for commercial trips on the “Industrial Monuments Route of the Silesian *Voivodeship*” was published. The “Industrial Monuments Route of the Silesian *Voivodeship*”:

- Presents what is outstanding about the region.
- Identifies the region and characterises it through its traditions, customs, everyday activities and items.
- Reflects the traditional culture of the region and gives the visitors an opportunity to experience it.
- Is based on regional products and services which are easy to identify and to distinguish.
- Comprises not only the tradition and past of the region but also its contemporary image, transformation and character.
- Allows for the creation of the desired image of the region.

It is important to use suitable marketing tools for the “Industrial Monuments Route of the Silesian *Voivodeship*” in order to monitor its development. The sites of the route need to have a common identity; thus it becomes important to have close co-operation between various actors (local authorities, non-governmental and private organisations).

The Silesian Tourist Organisation promotes the uniqueness of the route not only by participating in national and international tourist fairs but also by co-operating with local tourist organisations and agencies, which contribute to the development and promotion of the brand through:

- Classification of the sites within the route.
- Patronage over the trips on the route organised by local companies and tour operators.
- Support for various promotion tools, in co-operation with the Silesian Tourist Organisation, such as the publication and distribution of maps, guidebooks, folders, leaflets, etc.

- Efforts to include the route in the “European Route of Industrial Heritage” (ERIH).

The Polish Tourism Development Agency designed the route's logo and organised the training for the establishment of the local tourist organisations.

Lessons learnt and evaluation

The stages in realisation of the project

- July 2004-June 2005: The creation of the route started by nine audits realised by the Silesian *Voivodeship* Speaker's Office and the Silesian Cultural Heritage Centre. 53 sites were identified. The accessibility of the sites, their condition and the surrounding tourist infrastructure were taken into account. The importance of the sites in the history of technique, architecture or industrial tradition of the region was analysed. The local authorities, owners, restoration services and tourist organisations and companies were invited to participate. The Silesian *Voivodeship* Management established the new regional tourist product “Industrial Monuments Route of the Silesian *Voivodeship*” composed of 29 sites and provided financial resources for the project.
- August-October 2005: The Polish Tourism Development developed a logo for the route together with its Visual Identification Catalogue.
- March 2006: In March 2006, the Polish Tourism Development Agency conducted training on the establishment and operational rules of the local tourist organisations. The search began to identify a coordinator for the creation of the route.
- May-August 2006: A document “The Industrial Monuments Route of the Silesian *Voivodeship* Information System” was prepared.
- August-October 2006: The route was mapped out in the field and each site was provided with an information board. 260 000 copies of the map-brochure were published (Polish, English and German) and made available in tourist information points. Moreover, a thematic website was launched.
- January-October 2007: The “Silesian China” Factory in Katowice and the Historic “Guido” Coal Mine in Zabrze were added to the route. The

route was awarded by the Polish Tourist Organisation a certificate for being the “Best Tourist Product of 2007”.

Assessment of the project

The “Industrial Monuments Route of the Silesian *Voivodeship*” attracts a lot of attention, especially among Polish tourists. Foreign tourists also frequently visit the route, as statistics confirm. For example, the Brewery Museum in Żywiec, which was opened recently, was visited by about 103 000 tourists during the period of September 2006 to February 2008. Among the visitors, the largest group was composed of Polish tourists, but there were also a number of tourists from other European countries and other continents, *e.g.* North and South America, Asia.

In 2007, the Silesian Tourist Organisation conducted a marketing research devoted to the image of the Silesian *voivodeship*. The inhabitants of the *voivodeship* indicated diversity as the *voivodeship*’s distinguishing feature and potential for development. Positive changes in the region were acknowledged: infrastructure development, increase in investments, decrease in pollution and unemployment. Respondents showed deep understanding for the need to preserve the cultural achievements of the region, including its industrial heritage. Opinions were voiced that this potential should be utilised for the needs of the tourism industry.

The creation of the “Industrial Monuments Route of the Silesian *Voivodeship*” as a branded tourist product favoured the image of industrial tourism as historically, ethnographically and educationally attractive.

Surveys were carried out to determine the popularity of each site. For example, the Tychy Brewing Museum, which offers guided visits in several languages (English, German, French, Czech and Italian) is visited by several dozens of groups (several foreign groups among them) weekly. Its total number of visitors in 2007 reached 36 000, 5 400 of which were foreign tourists (15%).

The Brewery Museum in Żywiec, which has been open for only 16 months, had about 103 000 visitors during the period between September 2006 to February 2008.

In 2006, the Silver Mine was visited by 66 812 tourists, 5 481 of which were from abroad. In the same year, the Black Trout Drift was visited by a total of 41 212 people. In 2007, the Silver Mine was visited by 75 327 tourists, 6 507 of which were foreign visitors, and the Black Trout Drift was visited by 44 200 tourists. In comparison with 2004, the number of tourists visiting both sites in 2007 rose considerably. The number of tourists visiting

the Silver Mine rose by 11% (increase of 7 691 visitors), and the number of visitors in the Black Trout Drift rose by 8% (increase of 3 320 visitors).

In the “Queen Luiza” Coal Mining Open-Air Museum in Zabrze, there was a registered increase of 76% in the number of visitors from 2004. The museum was visited by 9 510 tourists in 2004 compared to 16 753 in 2007.

It can be concluded that there is an increasing interest in industrial tourism and that the “Industrial Monuments Route of the Silesian Voivodeship” has gained popularity and international renown.

There are examples in the Silesian *voivodeship* of post-industrial sites that have been converted into new sites not related with industry. Monuments have been converted into galleries, museums, colleges or science institutions. These have acquired a new identity, but several other precious monuments have not been saved.

Tourism gives vast opportunities to preserve industrial heritage and to make it attractive. The financing of industrial heritage with local, national and foreign funds contributes to the increase in the investment attractiveness of the *voivodeship* in the tourism sector (accommodation, catering and related services).

The promotion of the *voivodeship* as a tourism destination might stimulate programmes aimed at the preservation of the industrial heritage in the Silesian *voivodeship*. The “Industrial Monuments Route of the Silesian Voivodeship” is a model in this regard. By visiting the route, tourists have the chance to learn about the cultural and economic identity of the region. The route not only shows the history and traditions of the region but also its contemporary image and the changes it has undergone.

Barriers exist due to the *i*) perceived image of the Silesian *voivodeship* as a typical industrial, polluted, degraded and unattractive area; *ii*) the lack of a conceptual approach for using post-industrial sites in economic development; *iii*) the strong competition from tourist resorts abroad; and *iv*) limited access to external sources of funds. This is why it is important to have a joint policy between the state, *voivodeship* authorities and the tourist sector to formulate solutions to these problems.

The “Industrial Monuments Route of the Silesian Voivodeship” should be constantly developed and improved by effective co-operation between the various sites and by increasing the identity of the sites with the route, which may be quite low in some cases.

The promotion and development of the route is the task of the local authorities, *i.e.* the Silesian Voivodeship Speaker’s Office, and the organisations for development of tourism, *e.g.* the Silesian Tourist

Organisation, which should present the “Industrial Monuments Route of the Silesian *Voivodeship*” as an attractive product. The sites in the route should participate in the promotion activity. The co-operation of all sites is primordial as only joint interest in the project guarantees its success.

The “Industrial Monuments Route of the Silesian *Voivodeship*” is constantly being developed and new sites are being added, which increases its attractiveness. The marketing strategy for the route is planned for the long term. The important task will be the development of the distribution channels for the tourist product. An important element in the process of building the product is the efforts to include the “Industrial Monuments Route of the Silesian *Voivodeship*” in the European Route of Industrial Heritage.

Annex A. Summary of Culture and Tourism Case Studies

Australia	
Research team:	Industry Development Tourism Tasmania and the Department of Resources, Energy and Tourism
Coverage:	The study details issues relating to the attractiveness of the Port Arthur Historic Site and the Tasman region (located in south-eastern Tasmania, Australia) and the programmes designed and implemented by the managers of the site as a location of cultural significance to enhance this attractiveness.
Key issues:	<p>A robust long-term conservation outlook for the site and its assets.</p> <p>Enhanced interpretation of the site and surrounds, central to which lies the engagement and education of visitors and the wider community.</p> <p>Provision of an enhanced individual visitor experience and a broadening of target segments through product development.</p> <p>Development of “authentic” experiences where commercialisation is not the central precept, and that allows space for people to have their “own” experience.</p> <p>Better positioning in response to societal trends that suggest that a broad spectrum of society is at the point of engaging with history and heritage.</p> <p>Significant regional investment and partnership, and an increasing economic impact on the region.</p>
Austria	
Research team:	Vorarlberg Tourism and the Department for Tourism and Historical Objects, and the Federal Ministry of Economics and Labour.
Coverage:	The study is based on the Project, Future Strategy for Culture Tourism Vorarlberg 2010+ which is primarily focused on the elaboration of a strategy for the development of cultural tourism. The study covers: identification and examination of chances and possibilities in culture tourism; implementation of a SWOT analysis development of a future strategy with an international focus; involvement of strategic partners in culture and tourism; and definition of critical success factors.
Key issues:	<p>Establishing and strengthening a high level of interest among representatives of the culture and tourism sector.</p> <p>Participation of tourism and cultural institutions in the marketing co-operation.</p> <p>Intensifying the relations between cultural and tourism organisations.</p> <p>Positioning of a new tourism brand using cultural resources, which improves the image of the destinations.</p> <p>Official recognition of the culture tourism strategy by cultural and political institutions at a provincial level.</p>
France	
Research team:	Ministère délégué au Tourisme, Direction du Tourisme
Coverage:	The study deals with the tourism attractiveness of the large French cities and their effects on regional tourism development. The study examined the attractiveness of large French cities and reviewed the main elements that constitute attractiveness. It also examines what strategy is needed to develop attractiveness (innovation, geographical area, etc.).

Key issues:	Key elements constituting the attractiveness of large cities Strategies to develop this attractiveness Local economic development
Greece	
Research team:	Agrotouristiki S.A and the Ministry of Tourism
Coverage:	The study is based on the Project of Pausanias' Pathways. The Project deals with a cultural route in the Peloponnese that connects Ancient Olympia with Tripoli, Epidaurus, Mycenae and Corinth. The study examines issues related to the location attractiveness, the typology of the related programmes and lessons learnt and evaluation.
Key issues:	The programs support dynamic economic development and help retain the local population. Open discussion groups with associations of tourism professionals and local communities have been instrumental in ensuring the success of the network.
Italy	
Research team:	Department for Development and Competitiveness of Tourism
Coverage:	The study focuses on the Project, European Cultural Routes. The Project covers the co-operation between public sector and private sector; the integration of regional development; the development of quality tourism; and the promotion of cultural routes at national and international level.
Key issues:	Integrated local development. Promotion of cultural routes at national and international level Co-operation between public and private sector.
Japan	
Research team:	Yamagata prefecture and the Ministry of Land, Infrastructure, Transport and Tourism.
Coverage:	The study provides an overview of the Tourism Strategy in Yamagata which focuses on how to utilise regional culture as tourism resources as part of its inbound tourism policy.
Key issues:	Tourism development using unique and traditional cultural resources. Communication with local residents and tourists for better understanding of the culture.
Korea	
Research team:	The Ministry of Culture, Sports and Tourism
Coverage:	The study is based on survey results of the Temple Stay programme which is designed to help tourists stay overnight in a Buddhist temple and understand Korean Buddhist culture better. The study analyses tourist motivation, barriers and benefits of the programme, its potential attractiveness and policy implications.
Key issues:	Creative and innovative way of thinking in developing cultural tourism products. Strategy to transform cultural resources in tourism experiences (infrastructure, clusters, human resources). Strong partnership between public and private sectors in developing cultural resources as tourism products.
Mexico	
Research team:	The State of Michoacán and the Ministry of Tourism
Coverage:	The State of Michoacán's tourism policy entails the development of a new and functional model for cultural tourism. The study covers: the analysis on the tourism infrastructure; the assessment of tourism development; and the characteristics of culture tourism in Michoacán.
Key issues:	Developing new cultural products and cultural experiences for tourism. Encouraging direct contact between local population and tourists. Increasing the quality of services in hotels and restaurants Involving artisans in developing creative tourism.

Poland	
Research team:	Malopolska Region, Silesia Region and the Ministry of Sport and Tourism
Coverage:	<p><i>i)</i> The Wooden Architecture Route in Malopolska Region was brought to life to preserve the long forgotten wooden architecture as well as fast-disappearing traditions, customs and regional art. The study presents the characteristics of the route, its origin, structure, cultural resources and potential. It also gives a short insight into some of the activities that have been carried out to increase the attractiveness of the region.</p> <p><i>ii)</i> The Silesia region has developed an “Industrial Monuments Route of the Silesian Region” which is designed to link the region’s major attractions and highlight the local uniqueness of the region. The project underlines the importance of linking its cultural assets, the generation of a new image of the region, and marketing and promotion of the route.</p>
Key issues:	<p>Increasing the attractiveness of the region: updating the information; developing series of events; and advertising in diverse way for marketing.</p> <p>Successful dialogue among the stakeholders and horizontal co-operation.</p> <p>Long-term perspective regarding the implementation of the project.</p>
Portugal	
Research team:	The European Network of Village Tourism and Turismo de Portugal
Coverage:	The European Network of Village Tourism has been developed, using tourism as a catalyst for integration and sustainability, by promoting tourism development in the village involved and by creating a sustainable structure for European co-operation in this domain. The study examines the sustainable endogenous and tourism development and the networking between rural communities.
Key issues:	<p>Developing authentic experiences of village life, creation of a brand.</p> <p>Networking with other villages in Portugal and Europe.</p>
Romania	
Research team:	Oltenia Region and the Ministry for SMEs, Trade, Tourism and Liberal Professions.
Coverage:	Oltenia is one of the richest historical regions in Romania with many religious monuments. The Oltenia Project is focusing on marketing and branding issues and covers issues related to regional identity, public-private partnerships, and promotion strategies.
Key issues:	Developing regional identity through culture.
Slovak Republic	
Research team:	The Department of International Co-operation in Trenčín Region, the Department of Culture in Žilina Region and the Ministry of Economy.
Coverage:	<p><i>i)</i> The study covers the Autonomous Region of Trenčín and examines cultural tourism as a tool to revive an industrialised region.</p> <p><i>ii)</i> The case study monitors the cultural tourism developments of the Žilina Region and reviews the main factors with regard to the potential of developing cultural tourism.</p>
Key issues:	Development of a regional brand and regional package tours.
Turkey	
Research team:	Çorum region and the Ministry of Culture and Tourism
Coverage:	The study focuses on the Hittite Tourism Development project in the Çorum region. It covers: the major problems of enhancing the attractiveness of the region; rationale for government intervention; and the results of workshops on the tourism development of tourism in the region.
Key issues:	<p>Promotion of the destination’s cultural assets: restoration and archaeological excavations.</p> <p>Infrastructure improvement, particularly roads.</p> <p>Promotion of local cuisine and converting local crafts into touristic products.</p>

Note: Most of these case studies are available at www.oecd.org/cfe/tourism.

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The Impact of Culture on Tourism

Cultural tourism is one of the largest and fastest-growing global tourism markets. Culture and creative industries are increasingly being used to promote destinations and enhance their competitiveness and attractiveness. Many locations are now actively developing their tangible and intangible cultural assets as a means of developing comparative advantages in an increasingly competitive tourism marketplace, and to create local distinctiveness in the face of globalisation.

The Impact of Culture on Tourism examines the growing relationship between tourism and culture, and the way in which they have together become major drivers of destination attractiveness and competitiveness. Based on recent case studies that illustrate the different facets of the relationship between tourism, culture and regional attractiveness, and the policy interventions which can be taken to enhance the relationship, this publication shows how a strong link between tourism and culture can be fostered to help places become more attractive to tourists, as well as increasing their competitiveness as locations to live, visit, work and invest in.

The book is essential reading for academics, national and local policy makers and practitioners and all those in the tourism sector who wish to understand the relationship between culture, tourism and destination attractiveness.

The full text of this book is available on line via this link:

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