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# Tourism Management at UNESCO World Heritage Sites





# **Tourism Management at UNESCO World Heritage Sites**

edited by

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# **Chapter: Concepts, Doctrines and Lists**

## **UNESCO and the Convention Concerning the Protection of the World Cultural and Natural Heritage**

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### **SUMMARY**

This chapter presents the “Convention Concerning the Protection of the World Cultural and Natural Heritage of UNESCO”: its history and origins and the Society of Nations, the concept of the Outstanding Universal value and its criteria; the evolution of the list since 1972; and the various cultural, economic and social challenges that characterize it today.

## **INTRODUCTION**

The World Heritage Convention is one of UNESCO's most well-known and emblematic instruments. Adopted at the UNESCO General Conference in 1972, it was ratified in 2017 by 193 countries. In 2017, 1052 properties in 165 Member States have been inscribed on the list, and there are also 1710 properties on Tentative Lists. The growing number of inscribed properties has not curbed the "desire to be on the list". Each year, an increasing number of states submit natural, cultural or mixed properties to the World Heritage Committee.

Enthusiasm for inscription on the World Heritage List reflects the pride that such recognition may bring and the hope of being able to reap the benefits conferred by the label: greater media coverage, the prestige gained through association with UNESCO and the other prestigious properties already inscribed, and the hope of economic and local development via the future development of international tourism.

## **WORLD HERITAGE BEFORE THE 1972 CONVENTION**

### **THE INTRODUCTION OF THE IDEA OF A COMMON CULTURAL HERITAGE OF HUMANITY**

The notion of World Heritage originated in the discussions led by the League of Nations, but it did not materialize until after the Second World War.

In 1954, the Convention for the Protection of Cultural Property in the Event of Armed Conflict was ratified at The Hague. For the first time, States considered that damage to cultural property meant damage to the cultural heritage of all humankind.

### **THE INTERNATIONAL SAFEGUARDING CAMPAIGNS BEFORE THE 1972 WORLD HERITAGE CONVENTION**

In the 1960s, several UNESCO international safeguarding campaigns for heritage were launched.

The Nubian Campaign, launched in 1960, is one of the most impressive examples of international mobilization. In 1959, anticipating the construction of the Aswan Dam, the Egyptian and Sudanese governments called upon UNESCO to help them save local monuments from flooding. In 1960, the Director-General of UNESCO asked Member States to participate in the International Campaign to Save the Monuments of Nubia. Twenty-two monuments were relocated to higher ground, including the temple of Abu Simbel, during a campaign that spanned twenty years.

The Abu Simbel operation can be considered a major event whose most important outcome was spreading the idea that world heritage policy boosts the "intellectual and moral solidarity of mankind" (UNESCO Constitution, 1946).

The Venice Campaign was the longest international safeguarding campaign launched by UNESCO, following the 1966 flood. This campaign proved to be technically complex and costly. However, despite these difficulties, international cooperation around Venice became an inspirational model in the drafting of the 1972 Convention.

To give a more global structure to these actions, the States decided to implement international regulations for the common cultural heritage of humankind. A convention



was drawn up that established a “World Heritage List”, the main principle of which is that some properties are not only locally and nationally important, but are also of outstanding interest to all humankind. Protecting these properties is not the sole responsibility of the State, but the whole international community.

### **THE CONVENTION CONCERNING THE PROTECTION OF THE WORLD CULTURAL AND NATURAL HERITAGE (1972)**

The Convention Concerning the Protection of the World Cultural and Natural Heritage was adopted in November 1972 and came into force in December 1975. It was ratified by 24 countries in 1976 and 193 in 2017.

The association of the terms “cultural” and “natural” is a break from previous perceptions of heritage. The Convention established three types of property: cultural, natural and mixed (properties that are both cultural and natural). In the following years, this separation between nature and culture would be called into question.

#### **THE OUTSTANDING UNIVERSAL VALUE**

To be included on the World Heritage List, sites must be of Outstanding Universal Value (OUV), which forms the basis of the Convention. Each inscribed property must be able to justify its OUV.

While the earliest applicant justifications for inscription on the UNESCO List were relatively brief, new applications have become increasingly complex. They must show why the nominated properties are outstanding and different from other properties that share similar characteristics (historic, typological, etc.). To demonstrate its OUV, a property must meet at least one out of ten criteria as well as authenticity and integrity conditions. National and international comparative studies help to establish these hierarchies.

Given that the 1972 Convention covers tangible heritage, OUV must be apparent through the material “attributes” of the property that reflect its unique nature and characteristics.

#### **THE CRITERIA**

The criteria help to define the OUV and its scope. Since there are an increasing number of applications, selection criteria are becoming more demanding.

The ten criteria are regularly modified in line with the evolution of the concept of world heritage. In the beginning, world heritage properties were selected on the basis of six cultural and four natural criteria. In 2005, these criteria were merged to form a single list. To appear on the List, properties nominated for inscription must satisfy at least one criterion out of the ten, but they are often inscribed by virtue of several criteria. For example:

- criterion (i) “to represent a masterpiece of human creative genius” is rarely used on its own. Only three properties (Chateau and Estate of Chambord, Taj Mahal and Sydney Opera House) have been inscribed on the basis of this criterion

alone. In most cases it is combined with other criteria. Criterion (i) is also the most selective.

- criterion (vi): “to be directly or tangibly associated with events or living traditions, with ideas, or with beliefs, with artistic and literary works of outstanding universal significance”. This refers to a property’s intangible aspects. It enables properties to be included on the list primarily for their memorial dimension, and not for their materiality that may be a secondary dimension. Several memorial sites are inscribed exclusively on the basis of criterion (vi), for example, Island of Gorée, Senegal (1978); Auschwitz Birkenau in Poland (1979); Hiroshima Peace Memorial (Genbaku Dome) in Japan (1996); Old Bridge Area of the Old City of Mostar in Bosnia and Herzegovina (2005). To this end, criterion (vi) can be seen as a link between The World Heritage Convention and the 2003 Convention for the Safeguarding of Intangible Cultural Heritage, going beyond mere materiality as a medium for heritage value.

#### **LIST OF WORLD HERITAGE IN DANGER**

The 1972 Convention created, in line with the World Heritage List, the List of World Heritage in Danger. Even though the number of sites on the List of World Heritage in Danger is relatively limited, discourse on dangers and threats is ubiquitous.

However, inscription on the List does not automatically mean that the danger is managed. A distinction needs to be made between the danger and the threat. UNESCO make recommendations for many properties in a bid to encourage States to manage the threats, and to avoid these threats leading to an inscription on the List of World Heritage in Danger.

In 2017, fifty-five properties (38 cultural and 17 natural) are inscribed on the List of World Heritage in Danger.

#### **WORLD HERITAGE POLICY: PRACTICAL FUNCTIONING AND GOVERNANCE**

##### **THE CONVENTION’S MAIN POLICY-MAKING ENTITIES AND ITS ADVISORY BODIES**

Within UNESCO, in its Paris headquarters, since 1992, the World Heritage Centre has been the structure responsible for operation and coordination.

However, any strategic decision is taken by the States Parties, primarily within the World Heritage Committee, composed of 21 representatives of States Parties. This is an executive body that plays a key role by deciding each year on the nominations for the List, examining their state of conservation and formulating recommendations, even for inscription on or removal from the List of World Heritage in Danger.

The Committee’s decisions must be based on objective considerations and expert appraisal. The role of consultative bodies is therefore crucial in both the designation and monitoring of properties classed as World Heritage.

The International Council on Monuments and Sites (ICOMOS) and the International Union for Conservation of Nature (IUCN) are the two main advisory bodies that help the World Heritage Centre to evaluate candidate files and monitor their management.

The States Parties are responsible to UNESCO and the international community for the property's inscription and proper state of conservation. Governments, organizations and associations may be involved in the application process or the actual management of the property, but are not classed as official UNESCO representatives.

National and local governance around a UNESCO inscription is complicated.

- Initially, only the States were involved in the inscription process.
- However, the world heritage "label" is increasingly perceived as a stake in local development, leading many local authorities to launch application procedures after convincing government services to lend their official support.
- This involvement at the local level leads to the mobilization of a large range of actors such as elected bodies, public services, various economic professionals and stakeholders, associations, and civil society.

### **THE EVOLUTION OF THE WORLD HERITAGE CONVENTION**

The text of the 1972 Convention has not changed, but new conceptions of heritage have meant that it has been adapted. The notion of heritage is pluralized, open to new categories, and the role of heritage in society is evolving along these lines. Local development and tourism development are both starting to be viewed as legitimate objectives that are complementary to conservation. The role of local communities is growing in importance.

Supplementary documents enable world heritage policy to be adapted to these new paradigms.

First, application of the Convention is defined in the *Operational Guidelines for the Implementation of the World Heritage Convention*, which are regularly modified. This document provides standard formats for preparing nominations, sets out the wording of criteria, definition of integrity and authenticity, assessment of new properties, and recommendations in terms of management, for example, the implementation of a buffer zone around properties.

This is followed by statements identifying new strategic objectives. The Budapest Declaration (2002) "seeks to ensure an appropriate and equitable balance between conservation, sustainability and development", by setting out the known objectives as the 4Cs: Credibility of the List, effective Conservation, and increased Capacity and Communication. In 2007, a "fifth C" for "Communities" was added to complement these objectives.

Alongside the evolution of the instruments, the composition of the List itself is also being transformed.

### **EVOLUTIONS OF THE WORLD HERITAGE LIST**

In the first years of the Convention, the tendency was to inscribe the most famous and emblematic sites on the List. These were essentially monuments, archaeological sites or historical centres such as the Pyramids in Giza (Egypt), Kathmandu Valley (Nepal), the Historic Centre of Rome (Italy), the Medina of Fez (Morocco) and the Grand Canyon National Park (United States). This approach focused on exceptionalism.

However, this became a point of growing dissention and hence a factor in changing the underlying rationale for inscription on the List.

#### **BALANCE AND REPRESENTATIVENESS: TWO OF THE LIST'S CHALLENGES**

The World Heritage List has several imbalances. There are more cultural than natural properties, and different religions and spiritualities are not represented equally.

More generally, historic towns (in Europe and Latin America) and religious and military buildings are overrepresented, as are some historic periods. On the other hand, "living" and "traditional" cultures are underrepresented.

The imbalance has mainly geographical and administrative reasons. Some regions, in particular Europe, are overrepresented. Many southern countries, especially in sub-Saharan Africa, are poorly represented on the List, whereas others have a large number of properties.

This has been acknowledged for a long time. In 1994, the World Heritage Committee launched the Global Strategy for a Representative, Balanced and Credible World Heritage List to diminish these gaps. Its aim is to ensure that the List is a proper reflection of the cultural and natural diversity of the world heritage of humanity, by enlarging heritage typologies.

More countries were invited to become members of the Convention, to develop indicative Lists and nominations. This also meant a change in how it functioned by limiting the number of applications to two per year per country. In 1999, States were encouraged to make nominations corresponding to the underrepresented categories.

This produced mixed results. More and more States are now inscribing properties, for example, the Republic of Fiji and Qatar who inscribed properties in 2013 for the first time. However, in some cases, the imbalance is getting worse. Many States do not have the infrastructure necessary to prepare nominations at a sustained pace.

#### **NEW CATEGORIES: CULTURAL LANDSCAPES**

Defining new categories of heritage perception is a key tool for diversifying the types of properties inscribed.

Urban heritage was one such category very early on, following the 1976 Washington Charter. Then, in 1987, the typology of different types of urban heritage was added (towns which are no longer inhabited, living historic cities with historic centres, new towns, etc.).

However, there was a fundamental shift when "cultural landscapes" were created in the 1992 Guidelines. Defined as the result of interaction between Man and Nature over a relatively long period of time, the concept of cultural landscapes offers a global approach, recognizing the idea that a World Heritage Site is not frozen in time, but is living and evolving. This new category meant that parks and gardens, rural and agricultural zones and industrial-type cultural landscapes could be taken into account.

The first Cultural Landscape inscriptions date from 1997, and this category proved to be very successful. In 2017, a total of 88 properties, including four transboundary ones,

were inscribed as Cultural Landscapes. Examples of properties in France are Mont-Saint-Michel and its Bay, The Loire Valley, and The Climats, terroirs of Burgundy.

In 2005, the guidelines created other categories such as heritage journeys or cultural canals.

Besides these new categories and procedures, the very meaning of the World Heritage List is being transformed.

#### **PLURALIZATION OF THE WORLD HERITAGE LIST**

The first properties inscribed from 1978 primarily represented, according to Christina Cameron, “the best of the best”. This introduced a European or Western tropism, if not in the origin of the properties, at least in how they were considered.

Then the adoption of new heritage categories and the diversification of themes enabled new types of property to be introduced: wine and agriculture, routes, industrial heritage, postcolonial heritage, etc.

By diversifying the List, in line with human diversity, the quality of inscribed properties and the meaning associated with them evolved from uniqueness to representativeness. While the first properties inscribed had been unanimously accepted, without debate, properties that have been inscribed more recently incite more questions (e.g., Le Havre). These increasingly discussed properties reflect the increasingly diverse ways of understanding what heritage is.

Pluralization has been through several evolutions:

- More and more different types of properties are taken into account.
- The Convention takes into consideration both the “Unicum” (unique and rare elements, e.g., Venice) and the “Typicum” (elements that are representative of a series or a civilization, e.g., a colonial Hispanic town).
- The Convention oscillates between a unitary conception (reflecting human genius) and a plural conception (reflecting cultural diversity as a value in itself).

The expression of Outstanding Universal Value, the basis that forms the uniqueness of the List in all its diversity, is itself a pluralistic expression.

#### **FROM UNIVERSALITY TO PLURIVERSALITY**

Unambiguous guidelines that based the OUV on proven expertise are being challenged. The OUV now tends to be understood as an interpretation rather than an intrinsic quality of an object.

The inaugural example is Uluru-Kata Tjuṯa. This site was inscribed in the name of Ayres Rock on the UNESCO List in 1987, but only as a natural space. The Aborigines took steps to combat this symbolic dispossession of a site that was important to them and successfully asserted its cultural dimension. Ayres Rock then became Uluru-Kata Tjuṯa. The site is now inscribed as a natural and cultural space according to two different but juxtaposed views of what OUV is.

OUV is not unique, it can become plural. Universality is no longer understood as a common message or a uniform discourse, it is now considered in all its possible plurality of meanings, with equality and dignity at its core.

This is highly positive as it signifies pluralization of the voices that can express a heritage value. Local communities are now given a voice, whereas previously the predominant discourse came from the experts.

The shift from universality to pluriversality is often referred to in order to take into account this plurality of voices and possible values.

### **CONCLUSION: A LIST THAT IS CONSTANTLY EVOLVING**

The properties inscribed on the World Heritage List in 2017 reflect its constant evolution.

For example:

- The inscription of Asmara (Eritrea) a Modernist City of Africa, according to criteria (ii) and (iv) reflects the consideration of urbanism at the start of the 20th century and of its application in an African context.
- The inscription of the island of Kulangsu (China) according to criteria (ii) and (iv) reflects a willingness to recognize the outstanding: the fusion of diverse influences underlying the production of a new architectural movement called Amoy Deco style, a synthesis between the modernist style of the early 20th century and that of Art Deco.

Since the very first inscriptions in 1978, inscribed properties reflect how Humanity defines the values to which it provides universal scope.

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# **Chapter: Concepts, Doctrines and Lists**

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### **SUMMARY**

This chapter presents the 2003 “Convention for the Safeguarding of the Intangible Cultural Heritage” and the developments it has brought about in the last forty years. The notion of Intangible Cultural Heritage (ICH) has allowed for the protection of the non-architectural and non-natural sites, as well as for them to be represented on the ICH Representative List, if they meet five specific criteria. As with every change and innovation, there are, however, a few challenges that are as of today still the subject of discussion among experts.

## HISTORY OF THE 2003 CONVENTION

The theme addressed here is the Convention for the Safeguarding of the Intangible Cultural Heritage adopted at the UNESCO General Conference in 2003. This convention follows, and in a certain way encourages, the evolution of the notion of heritage. Over the last forty years, the notion of cultural heritage has continually changed to include not only monuments, historic buildings, works of art and natural landscapes, but also cultural expressions and practices, which are now commonly referred to as Intangible Cultural Heritage (ICH).

The adoption of the 2003 Convention is the result of a long consultation process that first involved two major international organizations: UNESCO and WIPO (the World Intellectual Property Organization). This joint work aimed to raise awareness of the importance of cultural practices and expressions, and of traditional skills and knowledge. In particular, it attempted to protect these cultural expressions through intellectual property measures.

Other countries contributed to the discussion on the protection of ICH. Bolivia in particular made a significant contribution. In 1973, the Bolivian Minister of Foreign Affairs and Religion wrote a letter to the Director-General of UNESCO drawing attention to the fact that the main existing instruments for protecting heritage were aimed at the protection of tangible objects and materials, and not forms of expression such as music and dance, for which there were no protecting instruments. The letter, also cited by Hafstein, stated that these practices “are at present undergoing the most intensive clandestine commercialization and export, in a process of commercially oriented transculturation destructive of the traditional cultures”.

In 1989, fifteen years after this letter, UNESCO adopted the *Recommendation on the Safeguarding of Traditional Culture and Folklore*. The virtue of this Recommendation is that it helped to define, at the international level, a specific law for the protection of these cultural expressions. However, this Recommendation is somewhat limited because it perpetuates a distinction between high and popular culture.

From the 1990s, UNESCO launched specific programmes for the transmission of intangible cultural heritage, particularly ones targeting the transmission of this heritage to future generations: First, UNESCO established the “Living Human Treasures” programme in 1993. Then, in 1997, the “Proclamation of the Masterpieces of the Oral and Intangible Heritage of Humanity”. The designation of these masterpieces is credited with enhancing visibility of this ICH at the international level. However, the proclamation is still strongly characterized by outstandingness and excellence; criteria that would be abandoned and superseded by the 2003 Convention.

In light of these experiences, the Convention for the Safeguarding of the Intangible Cultural Heritage (ICH) was adopted on 17 October 2003.

## THE NOTION OF THE INTANGIBLE CULTURAL HERITAGE

The ratification of this convention was rapid compared to that of the 1972 Convention. It sparked a lot of interest from Asian, African and South American States; Algeria, Mauritius, Japan, and Gabon being among the first ratifying countries. It came into force

in 2006, after the deposit of the 30th instrument of ratification, and to date has been ratified by 174 States.

This convention is the culmination of a long process that integrated so-called “intangible heritage” into international legal instruments, with the objective of ensuring the safeguarding of this heritage. To do this, the Convention established a system of three lists:

- First, the List of Intangible Cultural Heritage in Need of Urgent Safeguarding.
- Second, the Representative List of the Intangible Cultural Heritage of Humanity.
- Third, the Register of Best Safeguarding Practices.

Although this system of lists may resemble the one established by the 1972 Convention, there is a big difference: the shift from a criterion of excellence, founded on Outstanding Universal Value, to one primarily based on representativeness.

After the 2003 Convention, UNESCO provided States with a tool designed to rebalance a heritage policy whose main focus up until then, along with the 1972 Convention, had been architectural and natural sites. Safeguarding heritage was opened up to intangible aspects, and to knowledge and skills. This move sought to ensure a greater presence of the so-called “southern” countries on these heritage lists.

In Article 1 of the 2003 Convention, intangible heritage is defined as follows: “practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artefacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. (...)”.

As such, there is a wide spectrum of inscribed practices. For example, the coaxing rituals for taming camels through song in Mongolia. Tango. The Winegrowers’ Festival in Vevey, Switzerland. Washi, a skill used in the craftsmanship of hand-making paper from bark in Japan. Yoga. And many dances and forms of music (such as Lakalaka from Tonga in the Pacific).

These items are eligible for inscription on the ICH Representative List if they meet five criteria:

- that communities, groups and, in some cases, individuals, recognize them as part of their cultural heritage. A highly original feature of the Convention is the importance of putting the community centre stage. There must be a bearer community. For example, the “French people” are the community for the “Gastronomic meal of the French”. However, community does not automatically mean nation. For Japanese Washi, the bearer community is made up of three associations based in the three Washi production facilities. Local communities must also be involved in both the selection and the safeguarding process. Therefore, UNESCO prefers to use a bottom-up approach towards heritage management rather than a top-down one.
- Another criterion is that the items must be “transmitted from generation to generation”, which severely limits the heritage scope. It may be assumed that many things fall under the definition of a “heritage” practice, as recognized by the community and as something that gives them a strong sense of identity. For

example, commentators on the convention have raised the case of Live Action Role Playing Games, but a key element in this transmission criterion is that heritage must be defined as something that is relatively old. However, the age and historical resonance of this transmission should not be overstated. Studies have shown that some practices inscribed on the Representative List are relatively recent.

- Another criterion is that these elements must be: “constantly recreated by communities and groups in response to their environment, their interaction with nature and their history”. Once again, one of the Convention’s original features is its recognition of the living nature of heritage and the dynamic and creative aspect of culture. Heritage is thus seen as evolutionary and procedural.
- Another criterion is that the items must provide communities with “a sense of continuity”. This identity function of Intangible Cultural Heritage is an important element in the 2003 Convention that does not appear in the 1972 Convention.
- The final criterion is that these practices must “be compatible with existing international human rights instruments, as well as with the requirements of mutual respect among communities, groups and individuals, and of sustainable development” (UNESCO, 2003).

### **THE CHALLENGES OF A NEW CONCEPT**

The 2003 UNESCO Convention for the Safeguarding of the ICH introduced a new concept of heritage. This new way of seeing heritage is not, however, self-evident. One of the first difficulties – raised by many international researchers – lies in defining the meaning of intangible and, in particular, the intangible in opposition to the tangible. On the one hand, practices inscribed on the Intangible Cultural Heritage List very often have a tangible aspect, for example, the costumes, accessories and musical instruments necessary for dances and chants. On the other hand, what makes a cathedral, a historical site, a town centre, and a landscape important heritage-wise is not just the built environment itself, but also the histories and practices associated therein.

A further difficulty lies in the challenges involved in museological and inventorial approaches towards intangible cultural heritage. UNESCO encourages ratifying States to put in place inventory systems and lists of existing cultural heritage to enable the ICH to be identified and to avoid it becoming fixed. However, these tools – inventories and international lists – that are made available to heritage institutions, are not always designed to follow the dynamic dimension of heritage. So even though the Convention for the Safeguarding of the Intangible Cultural Heritage targets the social act of creating and reproducing heritage, this “dynamic” characteristic is often threatened by the very inventoring and listing processes themselves.

Another difficulty is the adverse effects that may be generated by this system of lists. These lists seek to ensure the visibility and viability of intangible cultural heritage and are an attempt to move beyond the notion of Outstanding Universal Value. However, this system has some constraints at the economic level and in terms of human resources and time. Such constraints forced the Secretariat of the 2003 Convention to severely limit the number of nominations examined/potentially inscribed properties each year.

As a consequence, the limits create adverse effects, notably increased visibility and benefits for inscribed items and this to the detriment of items not inscribed on these lists.

With the 2003 Convention, communities must play an active role in the selection of cultural properties and the inventory is no longer left to heritage professionals. “Resource persons” are invited to speak on behalf of the particular group concerned, who need to be able to choose a representative and to be involved in the safeguarding practices of the cultural properties.

This community involvement partly questions the role of heritage investigators, the expert institutional agents whose job it is to identify heritage. At the same time, work in many geographical areas shows that in reality this participatory dynamic is difficult to put in place, and that very often selection/safeguarding is initiated and driven by people who are outside or on the fringes of the community of practitioners.

This showcasing of the community role further assumes that the community will be sufficiently homogenous and non-confrontational to be able to agree on what defines their heritage. According to C. Bortolotto – an anthropologist who has worked on this subject – communities are never homogenous, tensions always divide them and this gives rise to conflicting interests, which are not really taken into consideration by the 2003 Convention.

Another paradox comes from the fact that the convention is based on the idea that local communities will identify the practices to be safeguarded. However, State intervention is necessary to carry out and validate the inventories at the national level, and above all, to submit the heritage list nominations. The State is the crucial link between the “communities” and UNESCO and as it is the State who selects the files to be submitted, it is likely to dismiss nominations from communities that it does not wish to recognize. In this way, ICH can become a factor in the political will to promote or weaken communities.

A final difficulty lies in the translation of the UNESCO texts and norms. The desired process of “participatory heritagization” implies a re-appropriation of the nature and objectives of the institutional programme by the bearer population of the heritagized property. Consequently, this raises the issue of the modalities for translating the institutional concepts and procedures created outside the group. More concretely, this means ascertaining how to translate notions like “intangible cultural heritage” or “masterpieces of the oral and intangible heritage”.

Heritage vocabulary and its definitions, grading and recognition procedures have been created in specific historical conditions that originally tied in with Eurocentric criteria. When UNESCO introduced the “intangible cultural heritage” category, it sought to move away from this Eurocentric vision, but despite this move, all societies do not share the same heritage issues.

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# **Chapter: Tourism at World Heritage Sites**

## **Opportunities and Challenges**

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### **SUMMARY**

There exists an ambiguous relationship today between World Heritage Sites and tourism. If, on the one hand, the World Heritage Site recognition represents a significant cultural asset, the fact that such an award often brings an overabundance of tourists is worrisome to say the least.

A series of differentiating aspects are identified that will facilitate a critical analysis of the impact of tourism, using the case of the recent recognition of the University of Coimbra – Alta and Sofia as a World Heritage Site.

## INTRODUCTION

Travel and tourism represent one of the largest economic sectors, as well as an activity shared and loved by most people. Although influenced by recent financial crises at the regional as well as at the global level, tourism is continuously growing. In the first fifty years of the twentieth century, it grew to become one of the major worldwide industries, accounting for 7% of world exports, generating 1/11 jobs in the world, and giving a contribution to the world GDP estimated at 10,2%, with forecasts over the next ten years predicting growth rates of 3,9% annually and by 2030, reaching 1.8 billion foreign visitors in addition to 5 to 6 billion domestic tourists by 2030 (World Travel & Tourism Council, 2017). In 2012, the UN World Tourism Organization (UNWTO) declared that one billion travelers crossed their national borders in a single year for touristic reasons, and another five to six billion were estimated to travel in their own countries every year (UNWTO, 2012).

The rapid growth of international tourism has been influenced by technological advancements and improvement in the quality of life, in particular: the greater accessibility to means of transport (particularly air travel), the diversification of the offer (that include now low-cost offers), the growing social and political value ascribed to travelling, emerging economies, improved communication and information, development and wide adoption of digital technologies (in particular smartphones and social media).

Tourism constitutes, for UNESCO World Heritage Sites, both an opportunity and a threat. The recognition of a site by UNESCO often leads the destination to reinvent itself, to innovate, to improve resources and products allocated for tourism, and to segment the tourism offer. In other cases, however, the destination does not equip itself with an adequate, or updated, tourism management plan, which considers the changes brought about by the UNESCO recognition.

As far as the relation between visitors and residents is concerned, the UNESCO recognition might foster mutual responsibility, creativity and self-esteem, but might also generate tension, when tourism leads to an abuse of spaces, commodification, increase of waste and resource exploitation.

Tourism is an opportunity of personal growth and constitutes an intense, mostly informal, *learning experience*, both for the traveler and for the host. Despite the reasons driving it, in fact, tourism is per se a cultural experience and a self-development opportunity for the traveler, who is exposed to different cultural traditions, lifestyles, and worldviews. The host, on his/her side, can share his/her own identity and learn from the foreigner. Tourism promotes mutual understanding and reinforces the sense of belonging to a certain cultural tradition, helps to reduce distances among people and social classes: in this sense, World Heritage Sites and their residents can receive great benefit by an increase in the number of visitors, but also represent a precious resource for tourists.



## FROM THE GRAND TOUR TO THE COTEMPORARY CHALLENGES OF TOURISM

The habit of travelling and the act of enjoying it have characterized humankind since the very beginning, almost as a 'biological inheritance' engraved in the human spirit, which draws people towards new and unfamiliar territories.

While, in the Middle Ages, travelling was usually related to pilgrimage and was driven mostly by a cathartic goal of redemption through suffering and self-reflection, it is from the Sixteenth century that visiting new territories took a formative dimension *par excellence*. Between the Seventeenth and the Nineteenth century, the practice of the Grand Tour spread among European aristocrat descendants, who used to travel out of their homeland on an organized journey, with educational, cultural and personal development goals (Hibbert, 1987). Italy was one of the favorite destinations, because of its Greek and Latin heritage (De Seta, 1982). At the beginning of the Nineteenth century, thanks to the overall improvement of life conditions and to the development of transportation and communication means, 'to go on a tour' ceased to be a privilege of aristocrats and became a social trend. The word 'tourist', which was originally used to indicate those who went on a tour to become gentlemen through a process of discovery and personal growth, started to refer to anyone who travelled for pleasure on a coherent and goal-oriented journey, regardless of his/her social origins.

Despite the meaning that people might give to tourism - being for some a time for escaping the daily routine, while for others a time for improving knowledge - common to everyone is the experience of an extraordinary time, in the etymological sense of breaking the ordinary time.

This idea of travelling and tourism as a privileged way of accessing new cultures and get in contact with foreign heritage, in this way refining man's character and enriching him with understanding of others, strongly marked the model of civilization in Europe.

Together with cultural and development aspects, with the spread of travel and tourism activities, the related economic aspect became relevant, both at the global and the local level.

The process of globalization, nowadays, compels places to pay special attention to their resources, as strategic support to identity and uniqueness. They strive to promote involvement of local industries, with creative and distinctive kinds of tourist entertainment activities, trying to value their tangible and intangible assets. At the same time, heritage properties have achieved place branding and experiential marketing and become the main vehicles for upgrading local tourism.

This is the context in which urban cultural tourism is seen across the board. When there is a simultaneous combination of historical centers of cities whose management is concerned with the quality of life of the locals, smart spatial planning (smart cities), territorial sustainability (spatial and for all users, including visitors), socio-economic enhancement and destination branding (creative cities), the recognition of renown, uniqueness, identity, authenticity and sustainability becomes especially significant when such qualities are assigned by certification institution, but they are even more important in the ability to attract demand. The importance of the cultural territory and the relations it manages to foster add great significance to the journey and to the experience

of places as tourist destinations. At present, UNESCO's recognition and certification of World Heritage Sites is of particular importance, in that it creates meaningful cultural assets for the tourist market (systematically expressed in the relationship between tourism supply and demand).

Sites inscribed in the World Heritage List usually concentrate different tourist amenities and multiple attractions, which attract high volumes of tourists. However, an excessive tourist demand makes destinations less sustainable, because their organization strategies often disregard the diversification of offer.

An aspect that still has a huge impact on destinations is weather. The authorities responsible for heritage sites should work on improving quality and sustainability, and on reducing seasonality.

### **CLASSIFIED SITES: IMPORTANT CULTURAL ASSETS IN TOURIST DEMAND**

The main goal of inscription on the World Heritage List is the “safeguarding and preserving the cultural and natural heritage of exceptional universal value for future generations” (Budapest Declaration on World Heritage, 2002). Nonetheless, based on data from the different management bodies of classified properties and expert reports published by UNESCO, it should also be stressed that the WH seal generates an increase in the site fame, associated with a number of benefits whose balance is generally positive, though requiring a committed strategy, continuous monitoring and constant assessment.

Although this document does not set out to produce a cost/benefit evaluation methodology for classified sites, it is important to reflect on the direct or indirect advantages that can accrue from the classification of a property, especially concerning the cultural heritage dimension.

Based on the study *Wider Value of UNESCO to the UK 2012-2013*, which is regarded as a good evaluation practice and pursued by several European National Commissions, it is clear that the process of integration in the UNESCO network can yield a diverse set of benefits, especially in the field of tourism and leisure (CNU-PT, 2014).

The UNESCO seal is indeed an asset in terms of attracting funds for the regeneration and maintenance of the property and the surrounding areas, and this in itself is an intergenerational gain in the preservation and use of a property. However, it seems clear that this classification generates other sources of direct and indirect revenue, whether these are leveraged by emphasizing the cultural-heritage relationship in the organized tourist supply, or by the flagging effect produced by the wider dissemination of the property to individual tourists. It should be noted, however, that success in these circumstances depends to a large extent on the growing importance attached to the motivations of the people/visitors and the alternative products they bring about, and tourist niches that enable them to develop in line with demand for them.

In this context, not only do we find revenue related directly to the consumption of the heritage product, in the form of increased earnings collected by the management authority, driven by higher visitor numbers, but indirect gains may also be listed. Some authors describe this as attraction induced by other activities (spatial planning, urban

reconstruction, hotel upgrading, diversification of catering, development of education and information centres, increase of services to support the visit), self-esteem of the resident population, increased security and increased research on the property in question (CNU-PT, 2014).

**In the case of Portugal**, a study promoted by the *National Commission UNESCO- Portugal* (CNU - PT, 2014) involving six classified historical centres (Angra do Heroísmo, Guimarães, Évora, Elvas and University of Coimbra - Alta and Sofia) found that the UNESCO classification not only generated public benefits from public programs to support the recovery, rehabilitation of real estate and public spaces, but it also led to a 70% rise in visitor numbers, followed by an increase in the number of beds and hotel establishments, of 82% and 56%, respectively. In addition, the number of restaurants increased, as did the average length of stay at the place of employment and employment. Conversely, there was a slight fall in average visitor spending (-3%), as well as a decline in the number of visitors from the school community (-32%). Regarding the decrease in the number of visitors from the school community, the negative change may be caused either by the absolute decrease in the young population or by the increase in visitable properties (CNU-PT, 2014, pp. 46-50).

In the specific case of the University of Coimbra - Alta and Sofia, and based on the number of visitors to the University of Coimbra, the impact of the classification noted in 2013 is strongly positive, with a significant increase in the visitation flow. Starting from a base of 238'851 visitors in 2013 (47% organized visit by agency, 53% private visit), 442'102 visitors were achieved in 2016 (46% visit organized by agency, 54% private visit), which is an increase of 85%.

**In Girona** there are no World Heritage sites, but in the region of Catalonia there are several WHSs with different levels of impact on tourism. For example, the works of Antoni Gaudi receive a very huge amount of tourists: *la Sagrada Familia* in 2016 received more than 2 million visitors; the reason is not only the fact that it is a World Heritage Site, but also that it is placed in Barcelona, which right now is one of the major tourist destinations in the Mediterranean. Four hours driving from Barcelona there are the Romanesque Churches of La Vall de Boi, which, thanks to inscription in the UNESCO list, strongly increased the numbers of visitors: in 1999 the number of visitors was around 39.000 and, after the declaration in 2000, it increased to 78.000. The place also increased in visibility towards locals and tourists, and received additional funds for improving interpretation tools from the Catalan Government.

**Italy** is one of the most famous destinations for cultural tourism. On a regional scale, the areas still showing a connection with the middle age pilgrimage and the *Grand Tour*, where most UNESCO sites are located, are especially popular with visitors (Veneto with Venice, Lombardy with Milan, Tuscany with Florence, Lazio with Rome, Campania with Pompeii). If big cities are often affected by phenomena of unsustainability and the erosion of the quality of life, in other locations, with special reference to small towns scattered in rural areas, the tourism experience is of high quality, and increasingly brings together both insiders and outsiders in the evolution of an approach of local development and social participation. An emblematic case is represented by the territory surrounding Siena, in Tuscany, stretching for about 3.800 km and hosting 3 out

of the 7 regional UNESCO sites: the historical centers of San Gimignano (included in the world heritage list in 1990), Siena (in the list since 1995), and the Valdorcia landscape (in the list since 2004). The urban area of Siena, however, shows signs of increasing congestion and a slight decrease of touristic flows (Amministrazione Provinciale di Siena – Ufficio Statistico, 2016). Studies conducted on a local and regional scale confirm that it is not possible to establish a cause-effect relationship between the UNESCO designation and tourism and territorial enhancement. As a matter of fact, the inclusion in the UNESCO list appears to be a strategic opportunity rather than a factor with an intrinsic value.

In order to design adequate policies for place sustainability, it is important to know and understand the motivations of tourists, who are key elements for the qualification of destinations; indeed, it is more important than ever to know who visits what, understand when and why. Tourism observatories, experiential marketing and an in-depth knowledge of the demand profile, are all information details that can determine the success of the strategies to promote sites and territories in terms of upgrading tourism. Such information also helps with drawing up control and planning measures, reducing seasonality and lowering the costs generated by congestion situations that impact both the preserved property and the community at large.

All these issues raise the need to position destinations, as well as to see how culture is understood in an innovative and creative way in the motivations of tourists. Tourists are becoming increasingly better informed, more aware of their mode of participation and of their social and ethical responsibilities. Satisfaction needs to be understood holistically, and this depends on the offer of alternatives in terms of enjoyability, pleasure and exceeding expectations. World Heritage Sites can be the cornerstone of this holistic process of satisfaction for a significant and growing number of tourists.

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# **Chapter: Tourism and Local Communities**

## **The Interplay between Tourism and the Community**

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### **SUMMARY**

This chapter deals with the multifaceted interrelations between host communities, tourists and tourism in and around World Heritage Sites. More specifically, it looks at the socio-cultural impacts of tourism and tourists' behavior in sites that are supposedly managed in a sustainable way. In reality, however, many WHSs are not managed in a sustainable manner. Thus, negative socio-cultural impacts become inevitable. This chapter proposes both policies and guidelines on how to deal with such problem before, while and/or after WHSs have been transformed into tourist attractions. In the heart of this policy lies a fundamental sustainability principle of community-based and/or community-centered tourism. This concept puts the host community in the center of any tourism planning, development and operational process. It is based on an ideology of socio-economic inclusion of such communities, public participation in decision-making and planning and bottom-up development approach. It is believed that if the guidelines and steps specified in the chapter are implemented, WHSs will become much more socio-culturally sustainable.

## **INTRODUCTION**

The relationships between World Heritage Sites (WHSs) operating as tourist products and the communities living in or around these sites is multifaceted. Thus, their complexity may determine their possible success in pursuing their interests. In recent years, planning, development and management agencies, as well as the academia, raised some serious questions regarding the management of such interrelations. The leading question has been how can we maintain socio-cultural sustainability in such host communities and, at the same time, share WHSs' cultural assets with cultural tourists? In the background of this question lies the notion that (a) the socio-cultural mosaic of each host community hosting tourists in a WHS is different, and consequently (b) each is generating its own socio-cultural carrying capacity and its reflective attitude towards WHSs and their impacts. Therefore, their reaction to an inscription of a WHS and its operation as a tourism attraction most likely will be different. This may cause a potential tension between the need for standardized planning, development and management of WHSs, on the one hand, and the need to tailor tourism according to the specific local constraints, expectations and needs of all fractions comprising the host community, on the other hand.

Accordingly, the aim of this chapter is to discuss sustainable solutions and guidelines on how to balance between the urge of transforming WHSs into tourist attractions and host communities' interest to protect their privacy, their cultural values and norms and their quality of life. Such solution should be tailored to the specific requirements and constraints of each particular community residing in or around WHSs.

## **BETWEEN SOCIO-CULTURAL POLICIES AND PRACTICES**

Tourism sustainability ideologically entails that all tourism attractions will be environmentally socio-culturally and economically balanced. However, the shift from the ideological to the applied level forms a real challenge. In fact, the weakest of all three has always been the socio-cultural endeavor. This is mainly due to the difficulty in measuring the expected and actual effects of tourism on the host community. In the absence of effective measurement tools, a wide range of "management" practices have been adopted, often based on trial and error. Some of them totally ignore the unique requirements of host communities. Others introduce limited community participation in planning and development, and only in rare occasions such practices involve community centered tourism planning and development.

When dealing with cultural tourism development and more specifically with WHSs, host communities' socio-cultural stress resulting from lack of community involvement in the planning and development processes may become much more evident. In such circumstances locals may clearly manifest their negative attitude toward tourism by claiming that they are exposed to the "zoo syndrome", staged authenticity, disassociated from their own heritage, etc. World heritage Properties (WHPs) often represent an extreme such case due to the following reasons:



- Often WHPs and host communities are sharing the same space.
- WHPs may represent a different (tangible and/or intangible) heritage than the one held by the current inhabitants of that site.
- Since WHPs attract tourists from a wide range of cultural backgrounds and from all parts of the world, chances of deviant cultural behavior on-site are higher.
- The act of inscribing a WHS is based on the requirement that the site will have Outstanding Universal Value (OUV). In practice, this policy may be interpreted by host communities as confiscating their own cultural identity.
- For marketing purposes, the cultural image created for WHPs and broadcasted in the media, may offend locals and force them to act either passively or actively against tourism and tourists wishing to visit the site.

The conclusion so far is that, in the case of shared space between WHPs and their host communities, planning, development and management policies must effectively put the community in the centre. They must ensure that all community interests, sensitivities, heritage background, and cultural identity(s) are met before bringing the WHP to an operational level.

### **COMMUNITIES SOCIO-CULTURAL GOALS FOR SUSTAINABLE WHPs**

As said, both host communities and tourist oriented WHSs share common functional spaces. This may create a potential conflict between these two stakeholders. After all, as a tourist product, WHSs are expected to maximize benefits while minimizing the negative socio-cultural, economic, environmental, and/or quality of life impacts. The dilemma, therefore, is what kind of goals should be set for the community in order to satisfy both parties and to ensure that the community's interests are well kept? This pursuit becomes more complicated when a given host community is far from being a homogeneous entity and represent conflicting internal interests. Thus, planners and decision-makers involved in preparing a heritage site for UNESCO inscription should carefully design commonly acceptable community sustainable goals. The most common ones will be:

#### **AT THE ENVIRONMENTAL LEVEL**

- Minimizing negative environmental impacts generated by (cultural) tourism.
- Allowing communities to define their own limits for acceptable environmental change.
- Involve locals with the planning, and management of consequent environmental impacts.
- Prove to locals that cultural tourism development of their shared space will restore already existing environmental damages as part of the inscription process.
- Develop a forced policy assuring that some profits made by tourism at a WHS will be injected directly into environmental management and maintenance of those properties.

**AT THE ECONOMIC LEVEL**

- Integrating communities into the local tourism economy by means of training, financial incentives, business incubators, etc.
- Opening up a local DMO or affiliating the community to a regional DMO to generate economies of scale advantages for the locals.
- Dispersing tourism business opportunities spatially and functionally to allow maximum numbers of business to benefit economically from the inscription.
- Plan and monitor small business development carefully to avoid large dropout in the first three years after inscription.

**AT THE SOCIO-CULTURAL LEVEL**

- Making sure at the planning and feasibility studies level that the identified Outstanding Universal Values (OUV) of a given WHS does not contradict locals' values and norms and even empowers them.
- Use conservation and preservation of heritage properties as a leverage for cultural revival (involving mainly the local young generation).
- Use the inscription process as a tool to foster local patriotism and wider appreciation of local heritage and enhancing community bonding.
- Allow locals to set their own agenda as to the socio-cultural change they are willing to experience due to much larger expected volume of visitors to the site.
- Set an on-going monitoring system that, through research, documents socio-cultural changes, characterize them, bring them to the awareness of WHS managers and facilitate dynamic and flexible visitation management policies.
- Allow representation of all fractions of the local community in all planning, development and operation levels.

**AT THE QUALITY-OF-LIFE LEVEL**

- Guaranteeing locals' access to recreational, heritage and tourism facilities developed as part of the touristification of WHPs.
- Managing visitation patterns to assure locals' accessibility to transportation systems and other services in the locality.
- Using the presence of tourists to create recreational, leisure events and services that need minimal economic thresholds.
- Minimizing any potential distraction to daily life.
- Minimizing or eliminating all forms of pollution generated by attracting tourists to WHPs.

**COMMUNITY LEVEL OF INVOLVEMENT AND CENTRALITY IN WHSS**

Level of community involvement in the evolving and functioning WHS as well as its centrality in the process are often neglected issues in the planning process. Consequently, often these issues are elaborated when the WHPs already experience several difficulties and malfunction. Thus, it is vital to set those levels already in the planning process and in any case well before the site is inscribed by UNESCO. In practice, there are three observed levels of possible community engagement: **Ignoring** – leaving

the community out of the process and fully ignoring its attitude and expectations from the evolving WHP. **Informing** – meaning that planners and decision-makers inform the community about the process, yet, expect the community not to partake in the planning, development and/or the management of the site and/or to define its own interests in this process. Finally – **Involving** by listening to the community's voice and interests and considering them as part of the overall process. In terms of level of centrality of communities' engagement in the process, there are also three possible levels: the lower level of communities that play only a minor role in the planning, development and management of WHSs. The second level refers to communities that play as equal stakeholders and the third level depicts communities that are leading the process, their engagement level is high and their interests and limits are put in the center of the process. It is important to note that the levels of community engagement and its centrality in the process may be dynamic and change over time and as the WHP moves from the planning stage, through the development stage and finally reaches steady state operation.

### **STEPS AND PRACTICES IN BUILDING COMMUNITY INVOLVEMENT IN WHPs**

Building community engagement in WHPs entails its active involvement all the way, starting from the planning stage until actual running of the site as a cultural tourism attraction. Following are action items to be applied in each stage as part of the planning process. Implementing them will assure that the community's interests will be well integrated through the whole process.

#### **STAGE 1**

Assessing the community's willingness to expose its culture and heritage to commodify it as part of the "tourist product". This feasibility study should cover all fractions of the host community in case it is comprised of subgroups representing different willingness to expose its own culture.

#### **STAGE 2**

Mapping potential conflicts over shared spaces and land uses. This crucial stage needs to be studied before the planning phase to guarantee no friction that stem from conflicting use of land and sensitivities over tourism activities that may ignite conflicts over cultural consumption of space.

#### **STAGE 3**

Mapping all relevant stakeholders to find out and characterize interrelationships and different interests (environmental, socio-cultural, economic and/or political) as well as "red lines", i.e. totally unacceptable prospect cultural ramifications in the wake of inscribing a given heritage site. This stage will help defining to what extent the community will be ignored, informed or involved in the three levels of cultural route product development.

**STAGE 4**

Assessing the community expectations on level of centrality. This stage will determine to what extent the interests of the community (economic, cultural etc.) in the inscription process will be put in the forefront.

**STAGE 5**

Assessing the community expectation on the level of engagement. This stage will examine to what extent the community is willing to participate in formulating planning, developing and managing the WHP.

**STAGE 6**

Setting up a final development policy by adjusting and accommodating community interests into the WHP plan based on all the above assessments.

**STAGE 7**

Putting together a final detailed plan based on stage 6 policy and which looks at all practical aspects of the planning development and operational management of the WHS. The output of this stage should be integrated to the management plan submitted to UNESCO as part of the site's dossier.

In both development and operation of WHSs, a policy of 'checks and balances' must be implemented. Checks should involve occasional surveys interviewing representatives of the community along the process on the implementation outcomes. The information sought in this case is a community reflection on whether their interests, needs and limits for acceptable change have been properly addressed. If there are any discrepancies between what they have expected and the actual tourism performance at the WHS is, they have to be balanced. Balancing may entail reframing the community needs and expectations as well as re-setting its limits from acceptable change, and finding ways to implement them on ground. This process will assure that communities' dynamic interpretation of tourism impacts will be always addressed and thus sustainability of WHPs will be kept along the whole process.

## GLOSSARY

*World Heritage Site* – The title often used to name a heritage site inscribed by UNESCO as a World Heritage Property

*World Heritage Property* – A term used by UNESCO's World Heritage Committee and by the World Heritage Convention referring to World Heritage Sites that received their title as they carry an outstanding universal cultural value.

*Socio-cultural carrying capacity* – A tourism development threshold that draws a line between a development stage that does not create negative socio-cultural impacts on host communities and development stage that does create negative socio-cultural impacts. When tourism operates beyond locals' socio-cultural carrying capacity, there is a risk that host communities will act against tourism and tourists.

*Limits for Acceptable Change (LAC)* – are usually set by local communities and draw the lines between what is acceptable and what is unacceptable in terms of socio-cultural tourism impacts in their locality.

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# **Chapter: Site Conservation/Enhancement and Tourist Management**

## **Site Conservation and Tourist Enhancement**

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### **SUMMARY**

This module aims at discussing the relation between heritage conservation and tourism. Tourism represents both an opportunity and a threat to heritage, thus it is a priority for site managers to equip themselves with a strategic plan able to combine needs and requests of different stakeholders, while at the same time preserving the site. Different approaches to site conservation have been proposed over time: the module reports some of the main approaches developed in Europe and proposes considerations about the difference between tangible and intangible heritage conservation practices. In addition, some practical tools to enhance sites management are discussed, aiming at supporting heritage and tourism professionals in their activity.

## INTRODUCTION

In the World Heritage Convention (1972), tourism is mentioned in Article 11.4 in negative terms: it is reported as a danger that might threaten heritage, thus leading to major operations in order to guarantee its conservation. Presenting the List of World Heritage in Danger<sup>1</sup>, the text says:

“The Committee shall establish, keep up to date and publish, whenever circumstances shall so require, under the title of "List of World Heritage in Danger", a list of the property appearing in the World Heritage List for the conservation of which major operations are necessary and for which assistance has been requested under this Convention. This list shall contain an estimate of the cost of such operations. The list may include only such property forming part of the cultural and natural heritage as is threatened by serious and specific dangers, such as the threat of disappearance caused by accelerated deterioration, large- scale public or private projects or rapid urban or tourist development projects; destruction caused by changes in the use or ownership of the land; major alterations due to unknown causes; abandonment for any reason whatsoever; the outbreak or the threat of an armed conflict; calamities and cataclysms; serious fires, earthquakes, landslides; volcanic eruptions; changes in water level, floods and tidal waves. The Committee may at any time, in case of urgent need, make a new entry in the List of World Heritage in Danger and publicize such entry immediately.”

The Convention, however, needs to be contextualized in the historical period it was first drafted, the so called “Fordist stage” of tourism that characterized the 20<sup>th</sup> century. In that period, thanks to the overall improvement of life conditions and to the development of transportation and communication means, tourism (to go on a ‘tour’) ceased to be a privilege of aristocrats and became a social trend. Today, we can speak of ‘mass tourism’, which sees masses of people devoting their free time to travel abroad, often buying standardized travel packages. It is often the case that neither the tourists are aware of the impact their behavior might have, nor Destination Management Organizations consider negative consequences of tourism on visited destinations.

UNESCO’s view on tourism changed over the years, as the establishment of Chairs<sup>2</sup> and Networks<sup>3</sup> devoted to tourism testifies. At the moment, there are seven UNESCO Chairs established at higher institutions around the world, whose education, research and development activities are explicitly connected to tourism: six of them focus on cultural tourism, and among them two Chairs directly consider the issue of sustainability in tourism, while one of them connects cultural tourism to peace and development. The UNITWIN Network “Culture, Tourism, Development”, established in 2002 at the University Paris 1 Panthéon-Sorbonne (Paris, France) – which has coordinated this MOOC project – confederates about 30 universities to join efforts in the fields of culture, tourism and development.

In January 2017, the Griffith University in Australia issued a report commissioned by UNESCO, which provides an assessment of tourism planning in natural and mixed World Heritage Sites (Becken and Wardle, 2017). The study revealed that 105 out of 229 WHS

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<sup>1</sup><http://whc.unesco.org/pg.cfm?cid=86>

<sup>2</sup><http://en.unesco.org/sites/default/files/list-unesco-chairs.pdf>

<sup>3</sup><http://en.unesco.org/sites/default/files/list-unesco-networks.pdf>



(46%) do not present a clearly accessible and in-date tourism plan, either as part of a general management or as a stand-alone tourism plan. Among the sites with a management plan, only 28% have an in-date and extensive level of tourism planning.

The effects of the UNESCO World Heritage recognition as a trigger of tourism interest are not univocal and still largely to be assessed. While some sites were already well known and attracted vast numbers of visitors far before the recognition, the WH label allowed other sites to enhance visibility and, thus, tourists; still other sites, then, remain mostly unknown despite the recognition.

This chapter discusses the topic of heritage conservation in relation to tourism. Both tangible and intangible heritage is considered, which need different conservation requirements because of their different nature. Some specific tools for heritage management and conservation are also presented. Several examples are suggested, which the readers are recommended to consider for further study.

### PERSPECTIVES ON HERITAGE CONSERVATION AND RESTORATION

Three main perspectives on heritage conservation might be distinguished, which were elaborated in Europe in the 19<sup>th</sup> century. The authors believe that it is important to have at least a general idea of them, since they constitute the conceptual basis of most of today's conservation management strategies. Therefore, the three perspectives are briefly outlined here, followed by some other relevant examples of conservation practices and traditions from other parts of the world.

It is important to remember that the notion of heritage is culturally constructed, and it has changed over time and through places, as pointed out in Chapters *Concepts, Doctrines and Lists (I)* and *(II)* of this MOOC. The 1972 World Heritage Convention takes into account that what is considered heritage is influenced by different value-related aspects as well as by different understandings of 'value'.

### THREE MAIN EUROPEAN VIEWS ON RESTORATION

One of the most influential theorists of the 19<sup>th</sup> century in material heritage restoration was the French architect **Eugène Viollet-le-Duc**. He elaborated and widely applied a controversial restoration theory, based on the idea that the restorative intervention has to bring buildings to 'a condition of completeness'. He believed that the outward appearance of a building should reflect the rational construction of the building, thus that goal of any architectural intervention is to find the ideal forms for specific materials, and using these forms to create buildings. According to Viollet-le-Duc, restoration is a "means to re-establish [a building] to a finished state, which may in fact never have actually existed at any given time."<sup>4</sup> Since his restorations frequently combined historical fact with creative modification, which often added entirely new elements of his own design, he was strongly criticized. Among his most famous restoration works are: Notre Dame de Paris, Mont Saint-Michel, Carcassonne, Roquetaillade castle and Pierrefonds castle.

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<sup>4</sup>Eugène-Emmanuel Viollet-le-Duc. ([1854] 1990). *The foundations of architecture*. New York: George Braziller. P. 195. (Translated by Kenneth D. Whitehead from the original French.)

Holding a completely opposite view, the **non-interventionist school** developed in the United Kingdom and was advocated mainly by John Ruskin, a leading English art critic. He strongly believed that a building should be made to last, that it is a testimony to the past, encompassing all periods it lives through. According to this view, restoration is destruction, because it alters the capability of a site to witness to the past and diminishes its character. Ultimately, if the building is no longer in use, decay and ruin are also part of the life and beauty of it, thus the only true course is preservation and conservation.

In a middle way between the French stylistic restoration theory and the English anti-restoration movement, lies the proposal of **Camillo Boito**, and Italian architect and writer, who was the main promoter of the first Italian Restoration Chart (*Prima Carta del Restauro*, 1883) that defined the 'Italian way' to restoration. Boito's core idea is the need to differentiate the styles and materials already existing and those used during the restoration process in such a way that the two can be clearly distinguished. If any elements have been removed for any reason, they should be on display in a nearby exhibition. Any restoration actions taken must be documented as accurately as possible with notes and, whenever possible, pictures.

#### **MORE IDEAS ON RESTORATION AND CONSERVATION**

"To protect living traditional cultures and preserve the traces of those which have disappeared", UNESCO has created within the World Heritage List a category called "**Cultural landscapes**", which includes for instance cultivated terraces on lofty mountains, gardens, sacred places that "testify to the creative genius, social development and the imaginative and spiritual vitality of humanity [and thus] are part of our collective identity."<sup>5</sup> The Tongo-Tengzuk Tallensi Cultural Landscape in Ghana<sup>6</sup> is being considered for inclusion in the World Heritage List. It is characterized by a unique combination of ancient cultural practices of its inhabitants: intensive land use, terracing and religious practices that for the most part have reached us intact. This conservation has been possible thanks to taboos and strict religious practices of the Golib believers, which have strengthened intra-community links, and the links between the community and the Divine, the ancestors and the land.

Different approaches of restoration/conservation can be distinguished also when objects are considered. **Kintsugi**, for instance is an ancient Japanese technique, which transforms something broken or 'imperfect' making it more beautiful, or even a work of art of its own. Instead of hiding away the repairs so that the user or viewer cannot see them, Kintsugi celebrates them as a reflection of the passage of time and makes them into the focal point. Kintsugi literally means 'golden joinery' or 'to patch with gold'. A mixture of lacquer and gold (it can also be silver or platinum) is used to join the pieces of the broken object back together. Highlighting the repair aims at acknowledging the break as an event of the object's life, instead of an end to it. This technique stems from the acceptance that the world we live in is imperfect and transitory. Kintsugi is similar

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<sup>5</sup><http://whc.unesco.org/en/culturallandscape/>.

<sup>6</sup>[http://www.iccom.org/ifrcdn/pdf/ICCROM\\_ICSO2\\_PratiquesTradition\\_fr.pdf](http://www.iccom.org/ifrcdn/pdf/ICCROM_ICSO2_PratiquesTradition_fr.pdf)

to the staple repair technique<sup>7</sup>, which is usually associated with China but was also widely used in ancient Europe and Russia.

The meaning attached to objects strongly influences how they are treated and, also, restored. The Maori (New Zealand) and the Aborigines (Australia), for instance, endow objects with spirits, making them become a sort of living being. The perception of some objects as sacred puts limitations on how they can be handled within the community and, as Sczeganowska<sup>8</sup> notes, by foreigners.

The deep connection between tangible and intangible dimensions in cultural heritage has driven UNESCO to establish the *Convention for the Safeguarding of the Intangible Cultural Heritage* (2003)<sup>9</sup>.

#### **THE VIEW OF NATURE AND ITS PRESERVATION**

Yellowstone National Park in the United States was established in 1872 and is a World Heritage since 1978. It is acknowledged as the first natural area under the protection of the law. Nowadays, Costa Rica is seen as the country with the biggest proportion of land under some kind of protection (around 25%). As stated in the report by Griffith University, America has a good proportion of natural World Heritage sites, especially when compared to Europe and the Near and Middle East zones.

The views on Nature also differ among world regions and ethnic groups. Developing this further, some scholars brought up the notion that natural heritage should also be regarded as a form of cultural heritage – since the notion of heritage is culturally constructed. Although here we will only outline two very different ways of gazing at nature (non-Western and Western), it must not be inferred that within these two categories all ethnic groups or nationalities share exactly the same beliefs, practices and other cultural aspects.

Generally speaking, traditionally non-Western societies tend to see the world from a holistic perception in such a way that man is part of the natural world. Ideally, this worldview creates a respectful relationship with the environment since any wrong done to it will ultimately alter human affairs as well.

Conversely, the Western world has developed a hostile and fearful relation towards a nature that is wild and menacing. This vision, though, runs parallel with the identification of nature with the possibility of a return to the biblical Eden. Deep changes in social mentality that took place since the 18th century have not eliminated these views, but only stressed the utilitarian view of the world. In the case of tourism, these three ideas combine in the commodification of nature: the consumption of views (“nature on display”), recreation areas within protected spaces, zoos and wildlife sanctuaries, etc.

Recently, the benefits of being in natural places have been recognized worldwide, with an increasing tourism offer built on them: from barefoot walks to forest therapies. However, some researchers have already pointed out the threats even quiet recreational activities may cause to certain ecosystems.

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<sup>7</sup><https://www.nationaltrust.org.uk/features/saving-the-family-china>

<sup>8</sup>[https://books.google.it/books?id=w5fFRK6dYuAC&hl=ca&redir\\_esc=y](https://books.google.it/books?id=w5fFRK6dYuAC&hl=ca&redir_esc=y)

<sup>9</sup><http://unesdoc.unesco.org/images//0013/001325/132540e.pdf>

### LIVING PRACTICES: CONSIDERATIONS ON IMMATERIAL HERITAGE

Intangible cultural heritage is the most recent heritage category that has been formally recognized by UNESCO. The core ideas at the basis of the recognition are that “intangible cultural heritage [is] a mainspring of cultural diversity and a guarantee of sustainable development”, and that it has an “invaluable role as a factor in bringing human beings closer together and ensuring exchange and understanding among them”. Globalization is seen as one of the main threats to intangible heritage, since it “give[s] rise, as does the phenomenon of intolerance, to grave threats of deterioration, disappearance and destruction of the intangible cultural heritage, in particular owing to a lack of resources for safeguarding such heritage”. In the Convention, younger generations are specifically addressed as those who need to develop a “greater awareness (...) of the importance of the intangible cultural heritage and of its safeguarding”.

As for tangible heritage, tourism can be either an opportunity or a threat for intangible heritage conservation, depending on how it is managed. A major threat is the risk of **commodification**, i.e. the transformation of practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artifacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage, into commodities or objects of trade, in order to achieve mere commercial goals. Intangible heritage is a ‘living heritage’, which develops and is transmitted from generation to generation, and is constantly recreated by individuals and communities because it is related to intangible values that are recognized as part of own cultural identity. If a living heritage is commodified, thus bent to commercial purposes, it risks losing its deep connection with identity values, if not even its meaning.

To safeguard intangible heritage and at the same time guaranteeing a unique experience to visitors, tourism managers should balance three aspects: visitors’ request for participation and engagement; local communities’ needs; economic sustainability.

### HERITAGE MANAGEMENT TOOLS

Several ‘tools’ can be used when opening a heritage site to tourism, which help in reaching the above-mentioned balance. Such tools must be complemented with knowledge of the site, of the public (e.g. statistics, patterns of site usage) and of the overall strategic view on the destination. Hereafter some of these tools are presented.

#### OWNERSHIP AND MANAGEMENT

Knowing who the main stakeholders involved in the ownership and management of a site are allows to identify their expectations and to understand which management approach and practices they are likely to adopt. In fact, even if preservation of heritage is one of the main goals of any heritage site manager, other public and private stakeholders may adopt different practices according to their specific goals.

In public owned sites, conservation goals represent usually an explicit priority. An example is Mount Kenya National Park<sup>10</sup>, which is both a World Heritage Site and a

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<sup>10</sup><http://www.kws.go.ke/content/mount-kenya-national-park-reserve>

Biosphere Reserve. Its conservation and management plans have been so far reviewed by an UNESCO committee to ensure that its distinctive features (i.e. (vii) criterion: "to contain superlative natural phenomena or areas of exceptional natural beauty and aesthetic importance", and (ix) criterion: "to be outstanding example representing significant on-going ecological and biological processes in the evolution and development of terrestrial, fresh water, coastal and marine ecosystems and communities of plants and animals"<sup>11</sup>) are protected with all the necessary measures. Yet visitor numbers have been decreasing in recent years<sup>12</sup>, most probably because of terrorism activities in the area.

However, public ownership is not a guarantee of effective conservation and management, because resources may be scarce and the site be placed in remote areas that are not in the priority list of public administration. The cultural landscape of the Dresden Elbe Valley in Germany, for instance, was even delisted<sup>13</sup> from the UNESCO WH list in 2009, because of the construction of a bridge across the area, which meant that the property failed to keep its "outstanding universal value as inscribed".

The risk of heritage sites exploitation to pursue profit goals is higher in privately managed sites. In order to reduce this risk, UNESCO requires the existence of management plans that must be approved by the committee; in extreme cases, sites can be delisted or placed in the list of World Heritage in Danger.

Considering the importance of private partners in preserving natural and cultural heritage sites, in 2015 UNESCO organized in Doha (Qatar) the first event where stakeholders of the private sector were invited to discuss opportunities of cooperation to World Heritage conservation and promotion activities. A second panel was organized in Bonn (Germany), and among invited stakeholders were Panasonic and Google<sup>14</sup>.

## ACCESSIBILITY

Accessibility has to be understood in two ways. First, as the existence of a material way to arrive to the site. Second, as the possibility for people in different conditions to access the site, including people with physical, sensory or intellectual disabilities. More information and ideas about this issue can be found on the website of the initiative *Design for All*<sup>15</sup>, which aims at ensuring that "anyone, including future generations, regardless of age, gender, capacities or cultural background, can participate in social, economic, cultural and leisure activities with equal opportunities".

As for the 'material' site accessibility, the following aspects need to be considered: where the monument is placed; if visitors need to arrive using their own transport (and if the roads are usable by all types of vehicles), if there is public transportation or if the place might at least be reached by walking from the main accommodation areas; if the way to the site is well signaled, so that it can be easily and clearly understood by anyone.

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<sup>11</sup><http://whc.unesco.org/en/list/800>

<sup>12</sup>[http://www.ieakenya.or.ke/number\\_of\\_the\\_week/number-of-visitors-to-national-parks-and-game-reserves-2011-2015](http://www.ieakenya.or.ke/number_of_the_week/number-of-visitors-to-national-parks-and-game-reserves-2011-2015)

<sup>13</sup><http://whc.unesco.org/en/news/522/>

<sup>14</sup><http://whc.unesco.org/en/news/1319/>

<sup>15</sup><http://designforall.org/index.php>

Days and opening hours must also be considered and, as much as possible, matched with hours visitors are more likely to visit the site. Sites managed by public organizations may be offering limited opening hours due to several constraints and because more time is spent on conservation and documentation issues than on welcoming visitors. The example of Wadi Al-Hitan in Egypt shows how a very interesting place from the perspective of natural history receives very few visitors – and mostly international ones – because it is located in a remote area, with unreliable information about times and access, that are also hard to find on the Internet.

#### **ACCESSIBILITY AND CARRYING CAPACITY**

World Tourism Organization defined carrying capacity in 1981 as:

“The maximum number of people that may visit a tourist destination at the same time, without causing destruction of the physical, economic, socio-cultural environment and unacceptable decrease in the quality of visitors' satisfaction.”

If a property has short opening hours, visitors will concentrate in that time frame, with a higher risk of causing unintentional harm to the site, which in turn will result in higher conservation and restoration costs. In certain places, a higher concentration of people can also result in the need for more security, since small pieces (rocks, pottery shards, etc.) may be taken as souvenirs without the visitor being aware of the damage caused. This was the case of Teide National Park in Spain, where it was declared unlawful to take volcanic stones as tokens of the visit<sup>16</sup> when it became a protected area.

A positive example is, instead, Chichenitzá in Mexico, which has recently made an agreement with tour operators, according to which different companies organize excursions to the site in different days of the week. Spreading visits also results in a better experience for the visitor, who can explore the place in a more relaxed mood.

Some sites sell tickets with a specific entrance time to ensure spaces do not get overcrowded. For example, Machu Picchu (Cuzco, Peru) is now selling tickets to access the citadel within a given time slot<sup>17</sup>, as well as limiting the number of people who can enter the site per day. Decisions about opening hours have to be made in agreement with different stakeholders to harmonize their different goals (from conservation to profit, from knowledge dissemination with resource management). In Spain, the palace and fortress complex of Alhambra in Granada has been using this strategy for a number of years with satisfactory results, while the program “Area of the Month”<sup>18</sup>, have allowed to make fragile sites accessible at least for a few days. These types of initiatives not only help conservation, but also encourage repeated visits.

When the site is composed of meaningful and interesting areas, but too fragile to be open to the public, reproductions and multimedia solutions can be used to provide the visitor with a taste of them. One well-known example of this type of sites are the Prehistoric Sites of Vézère Valley (France), where Lascaux cave is located. As early as

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<sup>16</sup><http://www.independent.co.uk/travel/europe/rock-star-the-volcanic-attraction-of-tenerife-1520978.html>

<sup>17</sup><https://www.theguardian.com/travel/2017/jun/20/machu-picchu-tickets-peru-timed-entry-control-flow-of-tourists>

<sup>18</sup><http://www.alhambra-patronato.es/index.php/Espacio-del-Mes/210+M5d637b1e38d/0/>



1963, managers realized contamination created by visitors (including body heat and condensation) and prompted the French government to shut the original cave to the public. In 1983, a “facsimile cave”<sup>19</sup> was opened and nowadays the annex museum offers a digital mapping and other technological options to admire the paintings.

### **PRICING POLICIES AND STRATEGIES**

Charging entrance fees represent the most direct way to gain funding for conservation and operation activities. Yet, managers must be careful not to turn them into a barrier to access the site. If entrance fees are calculated on the base of the general income of overseas visitors, they might be too high for locals, in this way excluding them from enjoying their own heritage. Also, local communities contribute to the conservation of the place in other forms: volunteering, paying taxes, through sponsorships and donations. Hence, some sites have set different prices for nationals and overseas visitors. A way to attract money without raising entrance fees is to offer services to tourists, such as restaurants, shops, special activities.

### **INTERPRETATION TOOLS**

The topic of tourism interpretation is tackled in a later module (*Tourism Interpretation on World Heritage Sites*), but it is relevant here to point out that interpretation plays an important role in conservation. In fact, an adequate interpretation of heritage site helps to promote people awareness, to enhance commitment and engagement with the site. Experience has shown that the more personally engaged a visitor feels, the more likely s/he is to adopt behaviors that are more respectful and promote awareness.

In addition, interpretation tools can be used to design itineraries and guided tours for different tourism segments, so that visitors are spread over time and place avoiding the harmful effects of overcrowding. Allowing entry only with an official tourist guide is a measure that helps conservation activity, since it is easier to control visitors.

### **MARKETING STRATEGIES**

The topic of Heritage Sites marketing strategies is covered in the module *Tourist Economy related to Heritage*; here it is enough to say that when designing marketing strategies, managers should take care that marketing messages and actions should also aim at fostering awareness about heritage values. Hence, the narrative should be one of a kind: “come and visit us because you will live an experience of identity and culture”. This is of even greater importance in the case of intangible heritage, which is intrinsically related to cultural values and identity.

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<sup>19</sup><http://lascaux.fieldmuseum.org/behind-the-scenes/the-reproduction>

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# **Chapter: Site Conservation/Enhancement and Tourist Management**

## **Technical Systems Contributing to Cultural Heritage Monitoring**

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### **SUMMARY**

The direct objective of a two year long project was to define the scope and structure of relevant information and data that could provide flexible and user friendly information and knowledge management solutions of major importance for individual site managers and States Parties being responsible for a cultural point of interest. During the research process, effective methods were found in order to integrate all text documents containing valuable scientific data into one data system base and to make them easily available and searchable. A review of the basic thesaurus of the relevant areas and organizations had to be integrated into a flexible Internet based structure, to provide conversion keys, including search engines, for more effective use of the present knowledge base. Managers have to be capable of creating comprehensive site, regional or even thematic collections, learn and create data processing and knowledge management standards, as well as rules to update information and provide meta data services on their own sites. At the same time these models can become a suitable basis for an approved system by the individual States Parties' World Heritage Information and Knowledge Management System that has to be developed on a step-by-step and incremental basis. Such system enables the State Parties to recognize any relevant changes, including improvement or deterioration or even disaster of world heritage sites in due time. It also enables them to attract partners for mutually beneficial co-operation in protection and development of the sites so that the research can lead them to integrated data models, a structure for training and education, collection, distribution and use of such data, as well as recommendations on data migration.

## INTRODUCTION

There are natural and manmade values on our planet. They trace back to many hundreds and thousands of years. By the examination of them, we receive information and knowledge of the evolution that has taken place from the very beginning. Taking it into consideration, learning out of it, results in the possibility to maintain development and continue our existence. That is the main task and responsibility of people dealing with heritage irrespectively from the fact whether it is built or natural, tangible or intangible. These are the main features of the 1972 World Heritage Convention by linking them together in a single document. It points out the way in which people interact with nature including the need of preserving the balance between the two.

Heritage is transmitted from generation to generation and has been constantly recreated by communities and groups corresponding to their actual technological knowledge in response to their environment, as an interaction with nature and to assure the historical conditions of their existence. The Convention for the Safeguarding of the Intangible Cultural Heritage (2003) defines intangible cultural heritage as the practice, representation, expressions, as well as the knowledge and skills that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. It is sometimes called living cultural heritage, and is manifested inter alia, as an oral tradition and expression, including language as a vehicle of the intangible cultural heritage; performing arts; social practices, rituals and festive events; knowledge and practices concerning nature and the universe including traditional craftsmanship that has got very near to extinction.

The outlined information management system has been elaborated by a Hungarian research team to support World Heritage site management.

## BASIC IDEAS

Step by step, people become conscious of the opportunities offered by technical inventions.

1. Become aware of the values of
  - history (by using better equipment for time definitions and go into detailed information provision of a site, namely by building reconstructions, landscape exploration, collection of objects, traces of living, of usage, etc.) and
  - environment (by increasing awareness through the most modern technical channels from aerial investigation to magnifiers about the composition of materials) including everything surrounding us.
    - natural and cultural heritage
    - tangible and intangible heritage
2. Record this knowledge by the most appropriate tools and arrange it in a systematic way (by applying computer systems for the establishment of databases and up-to-date retrieval technologies)
3. Learn and profit out of it (by the use of technological knowledge transfer through lifelong learning, e-learning systems)

4. Preserve and transmit it to future generations by improving restoration, maintenance and educational technologies.

Researches have been carried out making use of the above mentioned technical inventions and the most recent IT achievements. During the investigation, numerous effective methods were found in order to integrate all text documents containing valuable scientific data into one data system base and to make them easily available and searchable. In connection with the above, a review of the basic thesaurus of relevant areas and organizations had to be integrated into a flexible Internet based structure, to provide conversion keys, including search engines, for more effective use of the present knowledge base. Due to the growing interest, international research institutes had been collecting relevant public data on world heritage sites for more than a decade to follow regularly the state of conservation of their own and other cultural and natural world heritage sites.

### **DATA COLLECTION AND RECORDING**

Owners or managers of any heritage site or object have to be capable of creating comprehensive site, regional or even thematic collections, learn and create data processing and knowledge management standards, as well as rules to update information and provide metadata services on their own heritage. In the same time, these models are to become a suitable starting point for an approved system to be developed on a step-by-step and incremental basis. Such a system enables the owners or managers to recognize any relevant changes, including improvement or deterioration, or even disasters in due time. It also enables them to attract partners for mutually beneficial cooperation in protection and development, so that the research can lead them to integrated data models, a structure for training and education, collection, distribution and use of such data, as well as recommendations on data migration.

Nowadays, more and more heritage related research centers, authorities, civil organizations, councils and private persons require having an integrated, centrally maintained but decentralized database, which contains updated information regarding the state of conservation of national cultural and natural heritage sites. The most important need of research and development projects has been to start from a technologically sound, professionally accurate and internationally acceptable model basis and data sample.

It has been explored which basic elements of cultural and natural heritage have to be included into the site, national, regional and international systems. The scope of data to be recorded regarding the stored elements has to be determined in this phase, along with the points of connection to the adjunct databases, as well as the theoretical solution to ensure data authenticity and safety. It is also a research task to explore the circle of the potential users of the heritage database as well as to determine and register the changing and evolving demands for such databases.

As a result of the development, a model database can be created, which is able to register the specified components and functionally serve the potential users. By uniting two closely related aspects of the project, i.e. national and international standards,

together with research and training demands, it is possible to achieve another important goal - open the gates for international co-operation. By the use of these features, depending on the nature of the elements, the changes can be detected, managed and reported.

It is easier to identify the components of the database in case of built or natural heritage sites, whereas for the elements of intangible heritage there is a classification in three groups:

1. There are living elements: dance, music, where we can fix the status of the element in the given time and the series of evolution of that element or any aspect of its changes. Among the intangible heritage elements here, we have to include a tangible one: the landscapes that behave like intangible heritage from this point of view.
2. There are some kinds of elements being static or non-volatile, as the composed songs, music, literary elements which could be handled easier. Nevertheless, the different presentations of them have to be taken into consideration.
3. There are volatile heritage elements emerging from the moment: concerts, theatrical performances, presentations that could be conceived by their special aspects or technological fingerprints as pictures, videos formally or informally written memories.

The change detection of the latter two groups is much easier. In the third group each element is unique and unrepeatable and usually there is no relevance to compare them to each other. The elements of these two groups should be recorded in their original form as precisely and as detailed as it is technologically possible.

### **THE ADVANTAGE OF THE APPLICATION**

Based on the conclusions of the previously described management system researches, a heritage reporting application can be developed providing unified, searchable information about a given World Heritage Site (e.g. we have made it for the "Millenary Benedictine Monastery of Pannonhalma and its Natural Environment") demonstrating the full scale of aspects of manageable information on it. The system is made up of the following elements:

1. Web-based user environment including preference driven multi language-support
2. The menu system is also available in several languages and can be extended.
3. There is a map-based navigation system using about 100 maps depending on the complexity of the site.
4. A database is specifically developed to contain all the
  - documents,
  - multimedia files,
  - maps, pictures, drawings, photos, aerial and space photos,
  - internet links,
  - all text information produced about the World Heritage site

- related intangible heritage (local folkloric and historic texts, dance and music)
5. There are search engines for the separate search functions: on map searching, multiple topic searching:
    - by regions,
    - by sub regions,
    - by continents,
    - by states,
    - by initials of states and sites,
    - by site number.
  6. An advanced search mode can also be developed to combine two functions:
    - the user can simultaneously search for multiple data of a world heritage web site;
    - the user can search for words or expressions in several World Heritage documentations and this function also contains a synonym-dictionary search feature.
  7. It can have an interface to the National Heritage Protection System (or as it is called in a given country).
  8. It also has an interface and integration to facility management software that enables a regular maintenance even at sites of considerable extension.
  9. The system enables in-depth site demonstrations and representations to be used for up-to-date information provision electronically or on paper.
  10. The information structure is to be appropriate for describing values, exhibits, environment, related bibliography, links, access and other touristic data even related to touristic value chain including data about nearby accommodation, restaurant, shops.
  11. It is to be protected by authentication and access right management systems.
  12. It is provided with multiple search indexes and capabilities.
  13. It is also applicable for the representation of network sites.

## DATA PRESERVATION ISSUES

In the course of the implementation of the above complex recording, archiving, reporting, digitising and retrieval systems, we have encountered several side problems that also need to be handled, if the system is established to work properly for a longer period of time.

One of the most important issues is the archiving methodology named **Digital Stone Plate**. The project considering a strategy and organisational as well as technical solution can assess the archiving status, identify the procedures of recording, examine the legal prescriptions, setting up digitisation and migration plans for digitised or digitally created documents, maps, models, films, sounds etc. Beside general suggestions, the project provides the expert areas with practical methodological guidelines.

Another important subject matter to face is that the same term has different meaning in different countries, cultural societies. The different languages folklore customs, music, dance are the common areas of intangible heritage and the development of their

science is interrelated. The researches of these fields are of universal value and must be included in an archiving system that can be used worldwide and made accessible for experts involved.

The establishment of such a multifunctional archive raises a lot of technical problems. It is evident that results of professional researches and discoveries cannot be made public without predetermining the conditions and legal background for access rights and regulations. The establishment of a joint archive supposes the existence of a joint basic system, as only data arranged accordingly are applicable. If the basis can be well and unanimously identified, and the participants are able to fill it in with all available data, a generally exploitable, professional digital heritage archive will be created. Thus, different types of cultural heritage (buildings, artefacts, historical texts but even musical and dance productions) can be recorded and accessed by all participants for further work, research, co-operation and other functional purposes.

Another basic requirement of this system is that it should be suitable for later extensions. Some parts of the contents should be accessible for the general public in the future but its main objective should be to satisfy professional users. Namely, the work of university students, research workers, authorities and experts has to be considered and a legally clarified, scientifically appropriate access has to be assured for each layer of them. Subject maps and thesauri are necessary for the adequate handling of metadata and in the same time, for the establishment of structural conception, the systems of environment, contents and classification have to be carried out.

It has become clear by now for anyone working with world heritage site management or in a broader sense, in cultural areas that the continuity of history must be safeguarded, no civilisations, none of their constructions physical or spiritual products may disappear any more. People educated and living among such circumstances are going to be aware of this shared legacy of the common heritage. Heritage sites are considered as complex and important values in the 21st century and now our objective is not only the protection but also the preservation of these natural and human creations.



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# **Chapter: Tourism Interpretation on World Heritage Sites**

## **Sharing Our Stories**

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### **SUMMARY**

Tourism Interpretation is the art of telling tourists a good story about world cultural and natural heritage. It is a powerful communication tool for revealing meanings and relationships of heritage to visitors. However, designing tourism interpretation that balances the needs of visitors in today's experience economy, the conservation of World Heritage Sites, the desire of those who provide such interpretation, and the interest of those who live at the heritage site, is not a simple task. This module is an introduction to interpretation as a key component of tourist experiences at heritage sites.

## TELLING OUR STORIES

What do managers and operators of Semmering Railway, Archeological Site of Delphi, Ruins of Loropéni, Dinosaur Provincial Park, Sun Temple, cathedrals, historic centers and coral islands have in common? They all have things of interest to show to visitors and they all have something to tell about them.

Simply put, tourism interpretation is the art of telling a good story about our cultural and natural heritage to tourists. Heritage tourism depends on the story of the site, and on the willingness of people to travel to see, to learn about the heritage, and to experience the site. Interpretation is a powerful communication tool for engaging visitors and disseminating knowledge about heritage. All over the world, every day, millions of visitors visit World Heritage sites. If not guided properly, they can have a negative impact on the sites and on their settings. The principal threat to heritage sites in terms of visitors' awareness and sustainable development is an inadequate knowledge sharing about that heritage and its value for humanity. Tourism interpretation reveals meanings and relationships of heritage to visitors. Without interpretation, people would not be inspired to engage in heritage, would not be able to find their way to locations, nor would they understand the significance of, or be entertained by, the subject of interest. Without interpretation a historic site would be, in the eyes of the visitor, just another old site (Veverka, 2000). However, producing tourism interpretation that balances the needs of visitors, conservation of the site, desires of those who provide such interpretation, and the interests of local communities, is not a simple task. This module is an introduction to interpretation as a key component of tourist experience at heritage sites. Its purpose is to give students and practitioners an understanding of principles and ways, in which heritage can be interpreted to tourists.

## INTERPRETATION IN HERITAGE TOURISM: PROCESS AND PRINCIPLES

### INTERPRETATION AS A COMMUNICATION PROCESS

Storytelling is communication practice that was born with humankind. People have always strived to understand and explain the world around them. All cultures have explained and celebrated the land they live in, and the stories of their people – through art, writing, dance and oral traditions. Interpretation in heritage tourism is part of this tradition.

Tourism interpretation is a communication process designed to reveal meanings and relationships of cultural and natural heritage to tourists. According to Veverka (2000), interpretation is the most powerful communication process available to any heritage site management to communicate messages and stories about the sites to their visitors. They can use interpretation techniques to explain to visitors what is specific about the site and why it is valued as heritage. Interpretation as a communication process involves activities such as *“talking and listening, writing and reading, performing and witnessing, or, more generally, doing anything that involves ‘messages’ in any medium or situation”* (Griffin et al., 2015). Besides the message, the main components of a communicative event are sender, channel, receiver and feedback. The communication cycle begins

when the sender wants to share a message with the receiver and ends with receiver's reaction to the message. Reaction is the essence of communication. If a message in communication process does not stimulate any cognitive, emotional, or behavioral reaction of the visitor, it has probably failed its communication goal. Tourism interpretation aims at provoking some sort of reaction into visitors, which is able to make a difference in their tourism experience.

#### **INTERPRETATION AS A TOOL FOR CHANGING VISITOR ATTITUDE**

Heritage tourists travel to see, experience and learn about heritage sites, features, objects, people, events and stories. The educational component of heritage tourism has always been the key aspect of it. Today, heritage tourists want more, they want to learn, see, and do, so they travel to heritage sites for a mix of *edutainment* (education + entertainment) experiences. Heritage sites therefore use interpretation to meet visitors' needs, and to reach their own goals. Through interpretation, they encourage tourists' interest in learning, offer ways to enhance experiences, help tourists to understand a place and culture, and encourage their sustainable and responsible behaviors.

The 'science' of tourism interpretation can be traced back to sixty years ago, when in 1957 Freeman Tilden wrote his seminal book "Interpreting Our Heritage". In this book, Tilden defined six principles of interpretation that are still important for interpreters across the world.

#### **TILDEN'S PRINCIPLES OF INTERPRETATION THAT MIGHT CHANGE VISITORS' ATTITUDE**

1. Any interpretation that does not somehow relate with what is being displayed or described to something within the personality or experience of the visitor, will be sterile.
2. Information, as such, is not interpretation. Interpretation is revelation based upon information. But they are entirely different things. However all interpretation includes information.
3. Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable.
4. The chief aim of interpretation is not instruction, but provocation.
5. Interpretation should aim at presenting the whole picture (i.e. history, meaning, aspects) rather than a part or specific facts of the concerned heritage.
6. Interpretation addressed to children (say, up to the age of twelve) should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. To be at its best it will require a separate programme.

(Tilden 1977).

To enhance experiences and influence visitors' behavior, it is important to consider different visitors' segments at different heritage sites.

#### **INTERPRETATION AS AN ATTITUDE**

The distinctions between the segments of heritage tourists and a differentiated approach to tourism interpretation is becoming increasingly important. In the last two decades, global tourism has created new challenges for heritage sites. Today it is imperative to develop value propositions that create a holistic experience for the

visitors. Framed under the term the »experience economy«, focus of heritage tourism is moving away from products and tangibles, to concentrate on the processes taking place around visitors. The new role of tourism interpretation is to lead visitors to be actively involved in constructing their own experience through personalized interaction with heritage site (Mossberg et al. 2010). In twenty-first century, tourism interpretation is far more likely to recognize visitor empowerment than to change visitor attitudes and behaviors (Staiff 2014). With the new focus on the processes, interpretation becomes an attitude. It is a new way of thinking about the quality of communication and of services for visitors on heritage sites. It is a dedication to ensure powerful and effective experience in order to provide deeper benefits to individuals and to society. Taking into consideration human desire for meaning and connections to communities and places, interpretation on heritage sites identifies uniqueness of places and cultures and helps people develop a personal and collective sense of being and value.

### **PLANNING AND MANAGING TOURISM INTERPRETATION ON HERITAGE SITES**

If tourism interpretation has to be powerful and effective in “telling our stories”, it needs to be planned and managed with creativity and sensitivity. To be creative, tourism interpretation draws inspiration from other fields such as marketing, journalism, art, branding, retail, and business planning. Sensitivity on the other hand is gained, when tourism interpretation reflects the understanding that it is not produced by managers and operators of heritage sites, but rather co-created with the visitors.

#### **HOW TO START?**

Interpretation planning process should start with the following questions (Colquhoun 2005):

- Why interpret certain heritage topic or site to tourists?
- What is to be interpreted?
- Who are the audience/segments?
- Who should be involved in the interpretation process?
- What is interesting in our story, topic and theme?
- What are the objectives of interpretation on heritage site?
- How will the money allocated for interpretation be spent?
- Which interpretation techniques will be used?

Tourism interpretation should be sympathetic with the nature of the place, the audience and key messages.

### **INTERPRETATION TECHNIQUES**

There are two types of interpretation techniques: (1) personal or guided, and (2) non-personal or self-guided techniques.

### **PERSONAL OR GUIDED INTERPRETATION TECHNIQUES**

They refer to those interpretations delivered face to face. Personal interpretation can be a powerful and effective medium to influence visitor perceptions and behaviors. The three main advantages of personal interpretation are: a) visitors can ask questions, b) delivery can be flexible, and c) presentations can be tailored to each audience needs, desires and expectations.

Some types of personal interpretation techniques are:

- Guided tours (by foot or vehicle)
- Talks or presentations (scheduled or informal)
- Ad hoc interpretation (always informal, allows visitors to explore their interests)
- Open days and events (reach bigger audiences)
- Volunteer programs (conservation work with interpretation to provide meaningful experience)
- Seasonal programs (e.g. summer programs, special site tours or extended trips)

### **NON-PERSONAL OR SELF-GUIDED INTERPRETATION TECHNIQUES**

They include panels, displays, audio, audio-visual, mobile, multimedia, visitor and interpretive centers, art, sculpture and publications. Three main advantages of self-guided interpretation are: a) it can be delivered to a wider audience, b) it can be used at their leisure, c) it is cost effective. Self-guided interpretation should be placed where site features raise questions or create good stories, where are stopping points, and where it can be easily maintained. All self-guided techniques should be well designed and user friendly.

Interpretation techniques should also consider needs of specific types of audience, such as visitors with special needs and children.

### **VISITORS WITH SPECIAL NEEDS**

When tailoring interpretation for people with mobility limitations, visual or auditory impairments, some general techniques should be considered for heritage sites:

- multi-sensory experiences,
- guided activities,
- an audio option, listening post, or panel with sound,
- clearly structured text with big headings, large print brochures, special color combinations
- special maps, models, replicas for touching,
- appropriate heights and lights,
- steps to give better viewing.

### **CHILDREN**

Interpretation for children requires completely different didactic approach than that for adults. Interpretation techniques for children should follow the stages of child development with following example:

- 0-2 years – color, sound, touch, repetition
- 2-7 years – play, repeat, identify and match things, experience real things
- 7-11 years – creating own meanings, exploration, discover, fine motor co-ordination
- Over 11 years – more complex problem solving, participatory activities, discovery and exploration.

#### **SENSITIVE STORIES**

Sensitive stories are the type of stories that involve controversy, fear, loss, conflict, power, differences of values and opinion, and they relate to people. Difficult events and situations can become opportunities for visitors to learn and grow. The process of telling a sensitive story usually requires consultation with those involved, empathy and compassion, and accurate representation without judgment. Sensitive topics do not need to be resolved to be interpreted. Difficult stories told well can have positive outcomes but skills in sensitivity are required.

#### **STANDARDS**

To be planned and managed effectively, heritage interpretation should meet the standards of corporate culture of each heritage site and of the universal ICOMOS Interpretation Charter. The ICOMOS charter recognizes the fundamental role of interpretation in heritage conservation, and identifies universal principles of interpreter's professional ethics, authenticity, intellectual integrity, social responsibility, and respect and sensitivity for cultural uniqueness and local significance. The charter can be found on web sites of ICOMOS for each country.

To conclude, tourism interpretation is a communication process, a tool and an attitude. It is, or at least should be, a way of thinking about the quality of the communication and services for visitors on heritage sites.



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# **Chapter: eTourism for Heritage**

## **Heritage and Sustainable Tourism. The Role and Challenge of Information and Communication Technologies**

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### **SUMMARY**

In the last two decades Information and Communication Technologies (ICTs) have played a major role not only in the restoration sector, but also to promote and support visits and touristic activities. This has become particularly relevant due to the diffusion of smart phones, and the consequent experience and expectation of being “always on”. Heritage and cultural destinations can definitely benefit from ICTs, providing a range of relevant services and experiences, which can increase access to information by interested people, improve their experience once at the destination, better connect both locals and visitors to the heritage, dis-intermediate some relationships, and educate relevant stakeholders. This presentation provides a map of such possible uses, with some cases/examples and advices. It also briefly addresses the issues of Localization of online narratives about heritage, and of two problems related to an always connected world.

## INTRODUCTION: ON COMMUNICATION AND ITS MEDIA

Before exploring the overlapping area between ICTs and Heritage (Tourism), it is advisable to devote a few lines to what communication is all about, and to its history, where ICTs play a major role in recent times. The very term “communication” comes from the ancient Latin, and means to share a value (*cum*=together + *munus*=value). All human communities have at least a shared language they use to communicate within themselves, a language that is inherited by all members, and shared by them as one of the most precious goods they have. Losing it, would mean not being able to live together, as in the story of the Babel Tower. So the language is a heritage itself, through which all other heritages are conceived, referred to, negotiated, communicated (Cantoni, 2013).

Communication media – from handwriting/chirography up to smart phones – have evolved through many different steps, and usually in conjunction with transportation means. Think, for instance, of train and telegraph, airlines and radio, up to the point that contemporary transportation means could not be conceived, produced or operated without digital media.

In fact, at their very beginning, ICTs (Cantoni & Danowski, 2015) have been interpreted as able to escape geographical constraints, and potentially capable to kill geography: if I send an email to colleagues in the office next door or on the other side of the planet, no different practices and/or timing are required, as if all of them were in the same place, or – better – in an “utopic” space. The same can be said about the web, which allows ubiquitous access to resources whose geographical location becomes (apparently) irrelevant, and of contemporary so-called cloud computing. But Geography has taken and is taking back its place, if not its revenge. Nowadays data are more and more recorded together with their space-coordinates, and such geographical information is enriching the quality of services we can provide. Even more: mobile access to data has made us – the users themselves – a major part within geographical information systems (GIS): our position in the space, and our movements within it (space + time) are of the utmost importance to provide timely and useful information through so called LBS: Location Based Services. Even if it might not be perceived as such, also search engines have become LBS themselves: when we query them, they include our location as a major part of their search algorithm. Not to mention the success of satellite maps, and of all services that use them to represent data (mash-ups).

## eTOURISM

When thinking of ICTs and human mobility, we enter the large field of so-called eTourism, which encompasses the many relationships between Tourism and ICTs, both at the experiential level – how are travelers adopting and integrating such tools? – as well as at the level of related industries – how are tourism players (destinations, transportation, hospitality etc.) using ICTs in order to do their business in a more effective and efficient way?

Naturally, such field is so huge that cannot be mapped in a short presentation, nonetheless it is important to underline here that eTourism is having a major role at all phases of the travel experience, from pre-trip (inspiration, planning, buying), to the trip

itself, to the support it provides once at the destination (e.g.: mobile apps, augmented reality, navigation systems), up to the post-phase, when people can share experiences and reviews through eWord-of-Mouth. Correspondingly, the various stakeholders – from destinations to hotels, from attractions to local people – do use eTourism tools in order to reach prospects and serve travelers. ICTs are not only useful in order to disseminate messages, (mass) customizing them for different publics: they are also very important in order to listen to tourists and other stakeholders (De Ascaniis & Cantoni, 2017, 2018), who are becoming co-creators of place-related narratives, contributing to shape the image of a destination, and eventually its reputation (Marchiori & Cantoni, 2012).

Narratives about heritage places, the shaping itself of the meaning of “heritage” and of heritage places, are more and more happening online, at the intersection between messages published by official/professional players as well as by travelers and locals. In fact, online travel reviews (OTRs) are not only instances of *public* opinion, the same contents we might collect through a well-designed and well-distributed survey, but are also instances of *published* opinion: able to influence other travelers, who find them highly ranked by search engines and in high-traffic ad-hoc platforms (Marchiori & Cantoni, 2012).

## **ETOURISM AND HERITAGE**

eTourism-related services are particularly relevant for Heritage (tourism) in five areas. Let’s explore them along the first letters of the alphabet: (i) **A**ccess; (ii) **B**etter; (iii) **C**onnect; (iv) **D**is-intermediate; and (v) **E**ducate. For each case one or two examples will be mentioned, to better explain the affordances of the level being presented.

### **ACCESS**

ICTs can enlarge access: on the one hand they provide more (multimedia) info about heritage places for inspiration and information gathering, on the other hand they can support all planning phases of those who want to visit them.

*Examples.* The Swiss UNESCO Commission has recently published a series of short documentary films – in German, French, Italian, and English – that present the World Heritage Sites in the country, providing different views and levels of details, so to care for different audiences<sup>20</sup>. ArchaeoTourism2012 offers an archeological “Site of the month” to present Swiss archeological richness and to invite people to visit<sup>21</sup>.

### **BETTER**

Once visitors have reached the destination, eTourism-related services can enrich their experiences – think for instance of augmented reality when it comes to archeological sites, and in general of LBS, not to mention the possibility to take pictures and videos, so to keep and share memories. Or think of great opportunities for (informal-)learning and gamification, which might also be used in order to promote more responsible and sustainable tourism behavior.

<sup>20</sup><https://vimeo.com/unescoch/collections>

<sup>21</sup>[www.site-of-the-month.ch](http://www.site-of-the-month.ch)

*Examples.* Cluny Abbey, which used to be the largest church of Christendom before the construction of St. Peter in Rome, has been almost completely destroyed after French Revolution. Augmented Reality applications, running on large screens or available to be played on tablets and smart phones, offer the visitors the possibility to get a sense of how the church looked like in the past<sup>22</sup>. Mobile apps – as for instance “Welterbe Tessin” / “Patrimonio Ticino” – can enrich the experience through an eTreasure Hunt or other gamified features (see them on iOS<sup>23</sup> and Android<sup>24</sup> apps’ platforms).

### CONNECT

ICTs might help to connect (a) locals with their heritage; (b) locals with visitors; and (c) visitors with the heritage. Through digital storytelling, for instance, more narratives and viewpoints can be made available to travelers, so to better understand the heritage as it is seen and lived by locals; moreover, sharing economy services might promote interactions between travelers and the local community.

*Examples.* A gamified experience, available as an online quiz system, as well as a downloadable app, about the World Heritage Sites in the SADC – Southern African Development Community (gathering the fifteen countries in the southern part of the African continent) has helped 100k+ students to (informally) know more about their heritage, and to look at it as a possible source for development through sustainable tourism. It is being also used to select the best students in the “Junior Minister of Tourism” contest managed by RETOSA – Regional Tourism Organisation of Southern Africa<sup>25</sup>. The campaign #faces4heritage<sup>26</sup>, in support of the global UNESCO campaign #Unite4Heritage, promotes awareness raising of people about the violent destruction of heritage, inviting to consider the destroyed heritage as also *their* heritage.

### DIS-INTERMEDIATE

Coming to tourism and hospitality professionals, ICTs can help disintermediating some relationships. While it is true that in general we are witnessing a re-intermediation process of hotel booking (now in even less hands than before the internet), on the other side ICTs – if well managed – provide opportunities for micro players to direct interact with prospects and clients. By doing so, more money could reach the local communities, instead of remaining in the hands of intermediating tour operating players.

*Example.* A simple website developed and maintained by the Community Multimedia Center of the Ilha de Mozambique to support the local association of Bed& Breakfast owners, has helped them to reach about 60% of bookings of travelers directly referred by the website<sup>27</sup>.

<sup>22</sup>[www.clunypedia.com](http://www.clunypedia.com)

<sup>23</sup><https://itunes.apple.com/ch/app/welterbe-im-tessin-schweiz/id668027834?l=it&mt=8/> / <https://itunes.apple.com/ch/app/patrimonio-mondiale-ticino/id667953531?l=it&mt=8>

<sup>24</sup><https://play.google.com/store/apps/details?id=net.webatelier.WelterbeTI&hl=de/> / <https://play.google.com/store/apps/details?id=net.webatelier.PatrimonioTI&hl=it>

<sup>25</sup>[www.whacy.org](http://www.whacy.org)

<sup>26</sup>[www.faces4heritage.org](http://www.faces4heritage.org) and its channels on Twitter and Facebook:

<https://twitter.com/faces4heritage> and <https://www.facebook.com/faces4heritage/>

<sup>27</sup>[www.ilhademocambique.org](http://www.ilhademocambique.org)

## EDUCATE

ICTs can be extensively used also in order to train operators in the field. Due to the very structure of tourism and hospitality business – characterized by high turnover, seasonality, micro and SME – only a small percentage of operators can attend regular and extensive trainings. The flexibility offered by eLearning in terms of space and time, as well as in terms of costs (e.g. OER: Open Educational Resources, and MOOC: Massive Open Online Courses) fits very well with the needs of a sector where up-skilling and lifelong learning are so important.

*Examples.* The MOOC “eTourism: Communication Perspectives”<sup>28</sup>, the first one devoted to such topic, has attracted in its first round 5’500+ learners, 31% of them have been active, while 7.1% have completed the course and got a participation certificate. Half of them were full-time workers, who could not have attended regular courses on the topic; the second edition of this MOOC, offered also in Chinese, Spanish and Italian, as of May 2017 has already attracted 1’900+ learners (Lin et al., 2016). The Swiss National Tourism Office, which has pioneered in offering online training for foreign travel agents, in order to better prepare them to “sell” Switzerland as a tourism destination, in April 2017 has re-launched its Travel Academy, with a specific focus on Culture and Heritage<sup>29</sup>.

All the above elements can be summarized through a recent text by the European Council: “ICT can help to extend access, especially of young generations, can better the experience of travellers, help connect locals with their routes, and locals with visitors, dis-intermediate some relationships, they can also be used to train relevant players, especially micro enterprises.” (COE, 2017)

## THE CASE FOR LOCALIZATION

Such huge areas of application for eTourism and their related trends present several new challenges, at the communication level – for example: information and communication quality, analysis of eWord-of-Mouth, etc. – as well as at other levels: ranging from business and organizational models and processes, up to cultural and psychological effects. Hereafter let’s discuss a major issue, which has to be carefully taken into consideration by players in the field: (inter)cultural translation or Localization.

ICTs have provided a major contribution to make tourism one of the most globalized market, and narratives about the heritage – be they about established heritage sites, or capable to establish new ones – are nowadays continuously published and negotiated on the global symbolic market of online communication. This requires an even more careful attention to their interpretation by its addressees (in eTourism, using the term “target” would be highly misleading, due to the fact that online communication channels are always bi-directional). Translation is just a part of what is needed: presenting the heritage to people whose cultural background is very far from that specific heritage requires much more sophisticated interpretation processes, ranging from adaptation of calendars and units of measurement, to clarification of non-shared reference points (e.g.: who is St. Francis from Assisi might be fully obvious in some areas, and quite

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<sup>28</sup>[www.eTourismMOOC.ch](http://www.eTourismMOOC.ch)

<sup>29</sup><https://international.switzerlandtravelacademy.ch>

obscure in others; or “dinner time” might mean very different hours for different audiences), to full reconsideration of the content itself (“nearby” for domestic travelers or Europeans might be about 60 kilometers, while for Chinese travelling first time in Europe might mean another country), up to redesigning the message and the non-verbal elements (images, videos, navigation structure) to care for different expectations and values (Mele et al., 2015; Mele & Cantoni, 2016).

### **A CHALLENGE**

While in the lines above just a few of the many advantages of eTourism have been briefly outlined, it’s important to be aware that it brings with itself also specific threats. The most radical of them is the fact that ICTs – especially through the constant connection to the internet via a smartphone – might make more and more difficult to “vacate”, to experience a new and different place. In fact, my everyday environment – family and friends, social networks’ friends, business colleagues and bosses, mainstream media – is constantly with me, sort of keeping me anchored and locked, though in an elastic way, to the everyday life. Not capable any longer to vacate (or escape?) from it. Additionally, the very fact that the “smart” apparatus knows always where I am, it makes it almost impossible to get lost, one of the most powerful experiences in terms of pushing us to re-structure our world and prejudices about it, so to include what appears unexpected and unforeseen. Nowadays digital technologies appear to have normalized and domesticated all possible experiences and places, at the risk of making them almost in-different and fore-seen.



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# **Chapter: eTourism for Heritage**

## **Localization of Online Content**

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### **SUMMARY**

The phenomenon of tourism, wherever its stage may be, has deeply rooted cultural and linguistic connotations. Through localization it is possible to best convey the expressed message so that it may be understood properly by all publics. As culture is such a complex concept, one must be sure to appropriately understand and position it in the context of tourism sites, even more so with the use of ICTs. It is possible to transfer the importance of a site online and shape it in such a way that the receiving audience will perceive it “as sustainable”. In this respect, studies have been recently conducted on the way information of World Heritage Sites (WHS) and National Tourism Organizations (NTOs) is localized with regards to certain audiences in order to speak to the cultural background of the reference public.

## INTRODUCTION: WHAT IS LOCALIZATION

To start with, “Localization” can be defined as follows: “the process of modifying products or services to account for differences in distinct markets” (LISA 2007, p. 11). It then presupposes that

- products/services move across different areas
- they have such peculiarities to require changes

When it comes to the messages, they require not only a linguistic translation but also a cultural one to ensure that the message can get through and be understood properly. Here again, we need to focus on the receiver, who interprets the message based on the linguistic code, but also on his/her cultural background and previous experiences, implications and assumptions, expectations, and even clichés and stereotypes.

Before tackling cultural translation of messages, let us take a very simple example of an oven. Being sold in the US or in Switzerland, in an EU country or in China, an oven will require a different plug, operating voltage, size, and language for the interface and instructions. The price will be different with different currencies and the oven will have to be compliant with different standards and regulation systems. Alternatively, let us take the example of spaghetti being produced for different markets: the language of their packaging, images, colors and characters, suggested recipes, customer care telephone numbers, and cooking time. Everything has to be adapted to make them suitable for different contexts. In fact, people who move across borders while travelling as tourists also need to somehow change their language, behavior, and dress; they must have different documents (e.g., passports, visa, ID, driving licenses). They even need to do required vaccinations, etc.

## CULTURE AND ICTs

ICTs do not know borders and can be considered the very kernel of globalization: the world has become more and more, as McLuhan suggested, a “global village”. Still, messages encounter different linguistic, cultural, legal, and economic contexts, and have to be translated not only linguistically, but also culturally, in order to be adapted to different fruition contexts.

Some aspects of such a cultural translation/localization are quite straightforward (e.g., calendars, festivities, units of measure, currencies, and regulations). Or consider the common practices of a region (e.g., what time is lunchtime?). Does everybody know “Assisi”, or should the text specify that it is a small city in central Italy? By the way, what is a small city, after all? Is a Chinese small city a big city in Switzerland?

Other elements have to do with deeper cultural aspects and require careful attention. To better understand them, let us ask ourselves a very challenging question: what is a culture?

Let us approach it from an etymological point of view and retrace it to its linguistic root—the ancient Latin verb “colo”, which means “to look after”, “to care”. It was used at three different, even if closely interrelated, levels, which can help us better understand the complexity of culture.

- First, *colo* could be applied to the earth, so to have agriculture: the cultivation of vegetables and the breeding of animals. At this level, human beings interact with their environment and eco-system: to “domesticate” it, to make it more suitable to live in by themselves and by future generations (this is one of the elements stressed by “sustainability”).
- Second, *colo* can be applied to human beings themselves: to raise children, and ensure that persons grow their full human capacities. At this level, we meet those aspects that are more frequently associated with culture: educational systems, arts, and history.
- Third, *colo* can also be applied to the spiritual realm and becomes cult and religion. It has to do with the ultimate destiny of human beings, and provides the most comprehensive framework of understanding of the world. Also atheism, from this point of view, is a form of religion.

To be certain, such levels are not at all without overlapping areas: think of gastronomy and sport, in-between the first and the second layer, and of the role played by religion in promoting and shaping architecture and all the forms of arts. Each element can be a (major) tourism driver: from relaxing in the countryside while experiencing agricultural tourism, to the endless forms of gastronomic, sport, health, cultural, and religious tourism.

### APPLYING LOCALIZATION IN TOURISM SITES

This point of view can help (i) in analyzing and designing destinations’ websites. It requires inclusion of elements of the different cultural layers, in order to provide a comprehensive view of the destination itself and of the kind of experiences one is likely to have there. However, it also has to be considered (ii) while addressing people with different cultural backgrounds.

What is very clear and taken for granted in one culture might be very much distant from the experience of another one. The sentence of “Milan ‘Duomo’ is dedicated to St. Mary of the Nativity, and is the cathedral of the city” is very clear to a tourist/prospect who has some knowledge of the Christian faith, while it might be hardly understandable by others without this knowledge. In order to make it clearer, depending on the cultural background of the addressee, different elements have to be better explained: a cathedral is the church where a bishop is based (*is it clear enough? does the addressee know who a bishop is? should it be further clarified?*). Mary is the Mother of Jesus, the Son of God in Christianity. Her Nativity is very important for Christians.

This very simple and “touristic” example already shows that there is not any “culturally neutral” message: something that is fully meaningful for someone might be too much, or too little, for someone else.

Localization of websites and mobile apps is thus intended to preserve the message itself, with its communication goals, when different receivers are concerned. This has to do not only with texts but also with images, colors, examples, metaphors, and even

services. According to the very famous model by Geert Hofstede<sup>30</sup>, national cultures can be qualified depending on six major dimensions: (i) Power Distance; (ii) Individualism versus Collectivism; (iii) Masculinity versus Femininity; (iv) Uncertainty Avoidance; (v) Long Term Orientation versus Short Term Normative Orientation; (vi) Indulgence versus Restraint.

While other studies suggest distinguishing between High- and Low-Context cultures, Tigre Moura et al. (2014, p. 7) have recently proposed the following cultural framework for tourism sites, which is a modified version of Singh et al. (2003), based on the cultural classifications of Hofstede (1980) and Hall (1976). Tigre Moura et al. (2014) have also suggested that localization should not go beyond specific thresholds; otherwise, leisure tourists might perceive the destination as too similar to their own context, hence not attractive enough.

**Table 4.** Proposed Adaptation of the Cultural Framework for the Evaluation Of Cultural Values on Tourism Destination Websites.

Cultural Dimension	Cultural Categories	Operationalization
Collectivism	Community relations	Presence or absence of <i>sustainable tourism activities, activities relating to involvement with the local community; an emphasis on social responsibility</i>
	Clubs or chat rooms	Presence or absence of member's clubs, <i>chat with destination agents, chat with interest groups, message boards, discussion groups and live talks, social network sites</i>
	Family theme	Pictures of families, pictures of teams of employees, <i>groups of tourists, emphasis on team and group activities and tourists as a family</i>
Individualism	Newsletter	Online subscriptions, magazines, and newsletters
	Independence theme	Images and themes depicting self-reliance, self-cognition, achievement, <i>isolation and self-fulfillment</i>
	<i>Uniqueness of the destination</i>	<i>Emphasis on the unique features and differentiating aspects of the destination</i>
Power Distance	Personalization	Features such as attractions recommendations, individual acknowledgements or greetings <i>from the destination, travel planners, web page personalization, and customized travel packages</i>
	<i>Destination hierarchy info</i>	<i>Information about destination managers, politicians, local government or administration and hierarchy of the tourism sectors</i>
	Pictures of celebrities	<i>Pictures of important people in the society, including politicians, athletes, artists, and other celebrities</i>
	Proper titles	Titles of the important people <i>related to the destination</i> and titles of the people in the contact information
Uncertainty Avoidance	Vision statement	<i>Statement about the destination from destination managers or people who represent power in the society</i>
	Customer service	FAQs, <i>tourist service, tourist contact, tourist service e-mails</i> and toll-free numbers available 24 hours
	Guided navigation	Site maps, well-displayed links, links in the form of pictures or buttons, forward, backward, up, and down navigation buttons
	Tradition theme	Emphasis on history, emphasis on respect, veneration of elderly and the culture, and phrases like "most respected destination," "keeping the tradition alive," "for generations," etc.
	Local services	<i>Contact information for local tourism-related companies such as hotels, travel agencies, restaurants, and others; also contact information for personal safety services, such as police and hospitals</i>
	<i>Visualization of the place</i>	<i>Maps of the destination and reference to geographical localization, virtual tours, live webcams, weather charts, etc.</i>
High Context	Local terminology	Use of country-specific metaphors, names of festivals, puns, a general local touch in the vocabulary of the web page
	Aesthetics	Attention to aesthetic details, liberal use of colors, high bold colors, emphasis on images and context, and use of love and harmony appeal
	Politeness and indirectness	Greetings from the <i>destination</i> , images and pictures reflecting politeness, flowery language, and use on indirect expressions like "perhaps," "probably," and "somewhat"; overall humbleness in the <i>destination</i> philosophy and information
Low Context	Soft sell approach	Use of affective and subjective impression of intangible aspects of a product or service and more entertainment theme to promote the <i>destination</i>
	Hard sell	Discounts, promotions, coupons, and emphasis on products and services advantages using explicit comparison
	Rank or prestige of the destination	Features like <i>destination's</i> rank in the country, listings, and numbers showing the growth and importance of the <i>destination</i>
	Use of superlatives	Use of superlative words and sentences: like "we are the number one," "the most visited destination," the leader," and "world's most famous"

Note: Adaptations to the original framework are highlighted in italics.

(Source: Tigre Moura, Gnoth & Deans, 2014)

<sup>30</sup> <https://geert-hofstede.com/>

## **LOCALIZING WORLD HERITAGE SITES' INFORMATION IN NATIONAL TOURISM ORGANIZATIONS' WEBSITES**

Using the framework by Tigre Moura et al. (2014), a study by Mele et al. (2015) explores how National Tourism Organizations' (NTOs) websites localize information related to WHSs in Europe. Indeed, the process of cultural adaptation can foster a more sustainable and responsible behavior at the destination, by informing online visitors about local customs in an understandable way. In other words, the importance of a site, for instance, can be transferred online (before the tourist arrives there), tailoring it according to the cultural background of the reference audience and making it "sustainable" for them. In this sense, sustainability describes the characteristic of a piece of information to be carried over time by the receiver. In addition to this aspect, localization activities can help promote WHSs by stimulating different interpretations or viewpoints according to the cultural background of the reference audience (Mele & Cantoni, forthcoming). Thus, it can raise their appeal by leveraging on common historical threads between tourists' country of origin and the destination.

### **HOW CULTURAL DIMENSIONS ARE REPRESENTED ONLINE: THE CASE OF WHSs IN POLAND AND AUSTRIA**

The exploratory analysis by Mele et al. (2015) shows several interesting insights regarding differences in the depiction of WHSs in Austria, Poland, and Norway for the Italian and US-American publics, with reference to the cultural dimensions developed by Hofstede (1980) and Hall (1976). For instance, all Italian versions of the analyzed NTOs showed higher presence of characteristics related to Power Distance (PD) dimension (vs. US-American editions) when describing WHSs. At this regard, the webpage dedicated to the Old Town complex of the city of Zamość (Poland), a WHS since 1992, provided a rich description of local political power in the XVI century. Moreover, it informed the readers about the connection between Zamość and the architectural style of known commercial Italian cities (Ente Nazionale Polacco per il Turismo, 2016). In the Austrian NTO's website, the city of Salzburg, a WHS since 1997, presents more information on geographical context and means of transportation in the Italian version (versus US-American edition) (Austrian National Tourism Office, 2016). Such difference can be interpreted as a sign of Uncertainty Avoidance (AU), helping Italian visitors visualize the destination before getting there and decrease uncertainties connected to the tourist experience (Mele, De Ascaniis, & Cantoni, 2015).

### **RESEARCH AND PRACTICES REGARDING LOCALIZATION OF NTOs' WEBSITES**

In addition to the cases presented above, it is important to keep in mind that localization activities span from WHS-related information to the presentation and promotion of entire destinations online. For instance, research performed by Mele et al. (2016) explores the presence of cultural adaptation activities of Norway, Ireland, and Austria NTOs' websites for the promotion of activities and attractions for the Italian and US-American audience. Also in this case, content analysis showed clear efforts of website editors to adapt the information according to the cultural background of the reference public (Mele, De Ascaniis, & Cantoni, 2016). Finally, a report by Mele & Cantoni (2016),

published in collaboration with the European Travel Commission (ETC)<sup>31</sup>, explore the integration of localization practices at the European level by interviewing marketing and IT specialists from one third (n=11) of the NTOs inside ETC. Among the results, it is important to mention that 10 out of 11 NTOs declared to make use of adaptation processes. Moreover, the most preferred ones regarded the localization of textual contents, themes, and images and videos. The study also shown these activities also aim at avoiding offensive/stereotyping contents toward certain audiences, replacing information or activities that may be contrasting with the cultural background of the reference public (Mele & Cantoni, 2016).

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<sup>31</sup> <http://www.etc-corporate.org/>



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# **Chapter: Tourist Economy Related to Heritage**

## **World Heritage: Socio-Economic Perspectives**

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### **SUMMARY**

This module emphasizes that the twofold need of preserving places of special interest for future generations and of managing tourism as a global industry, compels both private and public institutions to consider not only preservation of World Heritage sites, but also socio-economic factors – those indicators used to define the relative health and wellbeing of individuals, groups, countries and geographic areas. In particular, the module focuses on basic socio-economic needs, funding for the promotion of World Heritage Sites, and The European Tourism Indicator System (ETIS) – a common methodology, provided by the European Commission, towards sustainable destination management. These tools can be used to increase the economic benefit that can follow from better management and more sustainable destinations, and be incorporated into marketing and communication plans, as well as informing long-term territorial strategy and policy.

## INTRODUCTION

“A World Heritage Site is a landmark or area which has been officially recognized by the United Nations, specifically by the United Nations Educational, Scientific and Cultural Organization (UNESCO). Sites are selected on the basis of having cultural, historical, scientific or some other form of significance, and they are legally protected by international treaties. UNESCO regards these sites as being important to the collective interests of humanity<sup>32</sup> (Unesco.org).”

Today people are increasingly aware of the importance of preserving areas of special interest for future generations. In today’s multicultural society, with the impact of globalisation and the homogenised and increasingly industrialised landscapes surrounding us, the idea of escaping towards an unspoiled and culturally rich environment for a holiday is ever more attractive.

These special places are often located in areas that are difficult to access and are, by their very nature, delicate and in need of protection. They are expensive to maintain, difficult to reach and often located in areas where natural resources are likely to be exploited. As a case in point, UNESCO was invited in 1954 to help Egypt preserve ancient sites before the construction of the Aswan dam. This resulted in a 30-year-long project, which preserved hundreds of temples and ancient artefacts and involved international cooperation. The whole world benefited from the project with various temples being moved to New York, Madrid, Turin and the Netherlands (Centre, 2017).

After the United States suggested a World Heritage Trust in 1965, various other proposals were discussed by International conservation groups, until on 16th November 1972 the “Convention Concerning the Protection of World Cultural and Natural Heritage” was agreed upon. As of May 2017, this has been ratified by 193 states (Unesco.org, 2017).

The most people would agree that protecting areas of special interest for all of humanity is a desirable goal. This module intends to start a discussion about the socio-economic impact of tourism on places recognized as world heritage.

## SOCIO-ECONOMIC IMPACT OF WORLD HERITAGE SITES

*Socio-economic factors* are those indicators used by international bodies (such as the United Nations) and national governments to define the relative health and wellbeing of individuals, groups, countries and geographic areas. Such factors represent objective measures of what is generally called ‘cost of living’ or ‘quality of life’. Each factor refers to an aspect that contributes to determining wellbeing, for instance: the level of education refers to people’s knowledge and competences, the amount of rainfall is related to pollution, rarity is used to assess the value of certain objects.

Socio-economic factors are influenced by variations in the social environment. Literacy levels, for example, represent a measure of communities’ educational needs, while the diffusion of diseases within certain areas is an indicator of general health.

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<sup>32</sup><http://whc.unesco.org>

To understand the socio-economic impact of tourism on World Heritage Sites it needs to identify the factors that might have a stronger impact on them. The primary factor is *accessibility*: the more accessible a site is, the more it can be visited; according to the type of site, the number of visits can vary a lot, with either positive or negative consequences (see Chapter *Opportunities and Challenges*).

Tourism can impact the economy of a region at different levels: *directly, indirectly and inducing* consequences in other areas. According to *Economywatch*<sup>33</sup>, an example of **Direct Impact** is the construction jobs created in building an airport and its associated infrastructure. **Indirect Impact** is given by the jobs created by the services offered, shops and ancillary services. **Induced Impact**, then, follows with the success or failure of the venture as such incidentals as transport and educational needs change or develop because of the project. UNESCO, The World Bank and The World Health Organisation use tourism as a basis to divine the relative health of nations (Unesco.org, 2017). To assess this they must be able to access the country and regard its assets or lack of them. Many poorer or less developed nations receive substantial loans from such international bodies which can generate a significant economic return. Often, they will look to find something special or rare within an area that can be developed as a project (Unesco.org, 2017).

The total contribution to both employment and GDP are seen as the main factors when assessing the economic position of a State. Many poor countries with few natural resources attract tourists with their outstanding natural beauty or rare animals. In Rwanda, for instance, which is difficult to reach, has bad communication ways and a history of war and social upheaval, the socio-economic factors for tourism are an important source of income: gorillas, in fact, are often exploited to attract tourists to the mythical misty mountains. Nigeria, instead, which is rich in natural resources such as oil and diamonds, rarely promotes its own wildlife, and is in general scarcely concerned with tourism, even if the quality of life is still low (WTTC, 2017).

## **BASIC SOCIO-ECONOMIC NEEDS**

Apart from its development level, any country can benefit from having World Heritage Sites within its jurisdiction; airports, motorways and associated communication ways must respect international standards, and there is a direct impact on employment at an infrastructure level. Tourism is often not the main reason why infrastructural works at communication ways are undertaken, which are instead usually driven by trade and social goals. The direct benefit of such works leads to the indirect benefit of workers spending money, needing to be accommodated and fed, and to the induced benefits of transporting and supplying these workers with services.

Rwanda, Uganda and Kenya are good examples of developing countries where tourism at WHSs is creating wealth. An induced benefit in this case might be recognized at the political level: the financial implications of attracting and managing tourism at WHSs might push governments, which suffer from corruption and instability, to keep good cooperation relations.

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<sup>33</sup> [economywatch.com](http://economywatch.com)

In other cases, instead, World Heritage Sites have no direct financial benefit for the host country but generate huge costs instead. Costa Rica, for example, has four WHSs, which need regular maintenance and monitoring by specialist teams, because of the effects that weather might cause (Amador, Alfaro, and Amador, 2014); specialists mostly come from abroad, since the country does not possess such expertise. Also, the delicate nature of such interventions and the remote areas where they are performed often precludes large-scale communications projects, such as new airports.

Considering the variety and number of WHSs, the assessment of the impact of socio-economic factors cannot be made on a comparative level, but rather has to consider each property singularly.

### **FUNDING FOR THE PROMOTION OF WORLD HERITAGE SITES**

In order for WHSs to be successfully managed, they need to rely on financial resources. The *World Heritage Fund*, which was established under Art. 15 of the 1972 *World Heritage Convention* and receives most of its funds from compulsory contributions from the State Parties and from voluntary contributions, constitutes the main financial resource for each WHS. In addition, money is also raised by sales of World Heritage publications, and by funds-in-trust<sup>34</sup> that are donations given by countries to support specific projects with defined goals and objectives<sup>35</sup>.

The *Rapid Response Facility*, for example, is a small grants programme jointly operated by the UNESCO World Heritage Centre, the United Nations Foundation and Fauna & Flora International. It aims at protecting natural World Heritage Sites in times of crisis, and to do so quickly, flexibly and in real time<sup>36</sup>.

All the institutions, on the local, regional and national scale, have a responsibility in pointing out the relevance of their historical/cultural attractions when it comes to asking for the designation of a site in UNESCO's World Heritage list (Patuelli, Mussoni and Candela, 2013), as well as in promoting it, establishing cooperation, supporting and monitoring initiatives, ensuring their feasibility and encouraging participation (Sachida, 2005).

Public and private stakeholders are involved in the production and provision of tourism-related services and initiatives, which might have a positive impact on the safeguard of cultural heritage and on the quality of life and development of local communities (Su, Li, 2012). National and regional governments and local administrators, for instance, are in charge of ensuring the conservation of WHS, building suitable infrastructures, promoting the lesser-known tourist attractions and resources to distribute visitors (see Chapter *Opportunities and Challenges*). The cooperation among local private stakeholders, then, is key to the success of a WHS (See the interview with Michele Maria Longo Mayor of Alberobello included in this chapter).

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<sup>34</sup><http://whc.unesco.org/en/funding/>

<sup>35</sup><http://whc.unesco.org/en/world-heritage-fund>

<sup>36</sup><http://whc.unesco.org/en/funding/#2>

## **ECONOMIC SUSTAINABILITY OF WORLD HERITAGE SITES: THE EUROPEAN TOURISM INDICATOR SYSTEM (ETIS)**

A research report by UNESCO highlights that approximately 70-80% of the World Heritage Sites appear to be scarcely involved in any initiative directed to a socio-economic impact creation, as their effort and resources are merely focused on preserving heritage and not on the development of local territories and population prosperity (World Heritage Status, 2009). Also, as the global tourism market has experienced persistent development (UNWTO, 2015), the need to maintain and preserve cultural heritage sites without damaging the natural and social environment represents an imperative.

From the 70's, an increasing body of knowledge has provided theoretical and practical contributions (Meadows *et al.*, 1972; WCED, 1987) on the need to consider economic sustainability, focused on maintaining economic activities related to tourism together with preserving the natural, heritage or social environment. In particular, it has been highlighted that "any form of tourism should itself be environmentally sustainable and be able to contribute indefinitely to broader sustainable development policies and objectives" (Sharpley, 2009, p. 327). The main principles of sustainable tourism are: minimizing environmental impacts, achieving conservation outcomes, being different, achieving authenticity, reflecting community values, understanding and targeting the markets, enhancing the experience, adding value, having good content, enhancing sense of place through design, providing mutual benefits to visitors and hosts, and building local capacity (Sharpley, 2009, p. 62).

Despite the fact that sustainability of tourism has gained increasing attention both at the academic and institutional level, and that policy makers and tourism organizations have promoted significant attempts for boosting sustainable tourism practices, it is often difficult to say if it has been reached or not (Gossling *et al.*, 2008; Ioannides, Apostolopoulos and Sonmez, 2001), especially in the context of WHS. The *European Tourism Indicator System* (ETIS) (European Commission, 2013) is a methodology developed by the European Commission that provides a tool to improve the sustainable management of destinations through a set of indicators.

ETIS is based on 27 core indicators and 40 optional indicators, grouped into four categories, that are: i) destination management; ii) social and cultural impact; iii) economic value; and iv) environmental impact.

i) Destination management indicators include: sustainable tourism public policy; sustainable tourism management in tourism enterprises; customer satisfaction; information and communication.

ii) Economic value indicators comprise: tourism flow (volume and value) at destination; tourism enterprises performance; quantity and quality of employment; safety and health; tourism and supply chain.

iii) Social and cultural impact indicators encompass: community/social impact; gender equality; equality/accessibility; protecting and enhancing cultural heritage, local identity and assets.

iv) Environmental impact indicators include: reducing transport impact; climate change; solid waste management; sewage treatment; water management; energy usage; landscape and biodiversity protection; light and noise management.

ETIS is based on the idea that assumption sustainable development and, consequently, sustainable heritage tourism development need to be pursued through a direct involvement and cooperation among citizens, private companies, policymakers, researchers, and NGOs operators.

ETIS aims at allowing beneficiaries to protect, promote and develop cultural heritage, to build intense partnerships that promote complementarities and empower all involved stakeholders, to share material and immaterial resources, to create synergetic surplus, and to collect data on issues that are related to the effects of tourism on community, economy, and environment. Given the complexity of WH tourism destinations, their development in a sustainable way represents a major challenge for their effective management. The ETIS indicators might be used to increase the economic benefit that can follow from better management and a more sustainable WH destination, and be incorporated into marketing and communication plans, as well as informing long-term territorial strategy and policy.



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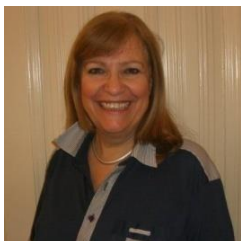
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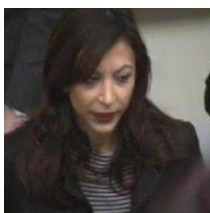
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He is a professor assistant at the University of Coimbra and researcher in CEGOT (Centre of Studies on Geography and Spatial Planning), since 2012.

Paulo is the author of 37 titles distributed by books, articles and proceeding papers. Main research areas: aging population, health geography and health tourism and wellness.

He collaborates regularly with several Brazilian and Mozambican universities in undergraduate and master's degree projects. He is coordinator of the undergraduate degree in Geography and teaches in the master's course of Tourism, Leisure and Heritage, as well as in the master's degree in Public Health.

### MARIA IRENE PRETE



Maria Irene Prete is Assistant Professor of Business Management at the University of Salento (Lecce, Italy), and Adjunct Professor of Heritage Marketing at the same university. She holds a PhD in Economic and Quantitative Methods for Market Analysis from the University of Salento and a MSc in Management from the Paris XII University, Paris (France). She has been visiting scholar at the Queen Mary – University of London (UK) and lecturer in different seminars on the topic of Marketing, Place Marketing, Heritage Marketing and Political Marketing at the University of Salento, University "La Sapienza" (Rome), LUISS University, and other public institutions. M. Irene Prete has published in numerous referred journals and has contributed in several national and international conferences.

### NORBERTO SANTOS



Norberto Santos. Geographer. Associate Professor with aggregation. Professor in University of Coimbra, Department of Geography and Tourism, and senior researcher in CEGOT (Centre of Studies on Geography and Spatial Planning).

He is the author of 100 titles distributed by books, chapters, articles and proceeding papers published in several countries: Brazil, Spain, Uruguai, Nepal, among others. His major scientific areas: Tourism, Urban Geography, Leisure studies, Gastronomy and Consumption, Territory and development.

Norberto is coordinator of the Master Course in Tourism, Territory and Heritage, associated at the catedra Unesco. He is the former coordinator of the Centre of Geographical Studies and former secretariat

of the Geography National Commission. He is director of the Department of Geography and Tourism of the University of Coimbra.

### **ANNA TRONO**



Anna Trono, provided with national scientific qualification in a full professor in Geography, is associate professor of Political and Economic Geography at the Department of Cultural Heritage, University of Salento (Lecce, Italy). She is director of the Laboratory of Geography at the same Department, where she teaches Political and Economic Geography at the bachelor courses and Geography of Tourism and Geography of Cultural and Environmental Heritage at the Master degree of History of Arts and Cultural Heritage.

She studies strong and weak areas of the EU, regional development policies and issues of local development and has conducted research into the protection and promotion of cultural and environmental heritage for sustainable tourism. She has published numerous essays and books on these themes, many of which in connection with large-scale projects involving local and regional organisations and other universities in Italy and elsewhere, under the aegis of European Union research programs.

As chief scientist or other component of work groups, she is actively involved in the preparation and management of numerous national and international research projects and in the organisation of international workshops and conferences on religious tourism and cultural heritage.

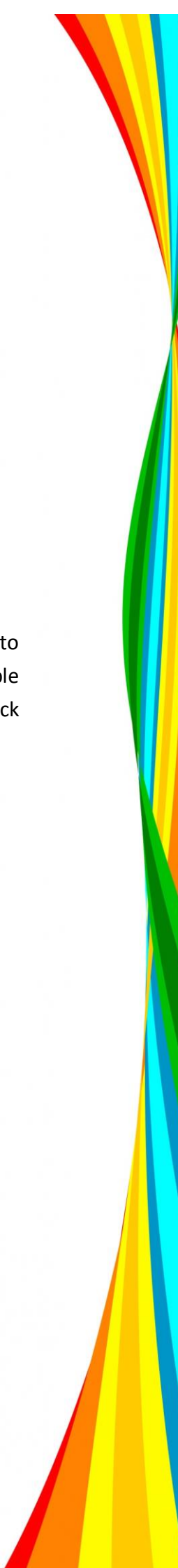
Member of the Steering Committee of the IGU Commission on Geography of Governance, she is also delegate for the University of Salento of Unesco Unitwin - Network "Culture-Tourism-Development" and president of the International Cultural Association "Viator Study Center. Research and Development of Vie Francigene and Historical Mediterranean Routes".

### **MARIA DOLORS VIDAL CASELLAS**



Dr. Vidal is the director of the Chair on gastronomy, culture and tourism Calonge - Sant Antoni and is the founder of the Official Master in Cultural Tourism and the Master in Communication and Art Critic. She is also member of several cultural tourism international networks: Ibertur, Atlas and UNITWIN "Culture Tourism and Development" (UNESCO).

Her main research interest is cultural tourism: history, imagery and communication. She is mainly interested in how architecture is used in the tourism industry, religious tourism and tourism at cultural World Heritage Sites.



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