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## **CULTURAL TOURISM AS COMPETITIVE FACTOR IN MEDITERRANEAN TOURISM – A comparative study of the Japanese and the German source markets for the Italian cultural heritage**

*The Mediterranean region is a delicate area of living, exposed to severe trouble that may be caused even by minor influences, e.g. military conflicts. Therefore, it is necessary to search for useful long-term solutions for tourism in the countries of this region. Due to the abundance of cultural assets, cultural tourism becomes ever more important. On the other hand, the weak points of product development and marketing become apparent in spite of great demand. This empirical study determines the needs of people potentially interested in visiting Italy with the example of the source markets in Japan and in Germany, particularly considering cultural tourism with specific consideration of castles and stately homes. Having determined these needs, it will be possible to show the required consequences for product development and marketing at a local, regional, national and international level.*

*Key words: cultural tourism, Mediterranean tourism, castles and stately homes, source and receptive markets.*

### **1. INTRODUCTION**

Today, cultural tourism comprises a wide and varied range of offers, adjusted to the diverse and different wishes and needs of cultural tourists. As concerns offers, on the one hand cultural tourism comprises travel offers that are especially focused on "culture" in the narrow sense. These are trips realized for the exclusive purpose to get to know cultural assets or to study them in more detail. On the other hand, trips are offered which integrate some cultural components among other aspects. And the expression cultural tourism - although in a broader sense - is also used for these offers. For example, the so-called city trips more and more include cultural offers. Theme tourism becomes an ever more important part of cultural tourism, e.g. with special offers to visit castles and stately homes or specific visitor programs around a region's historic sites. However, the meaning of cultural tourism is better to understand from the part of demand than the part of offers: Concerning the demand for cultural travel, potential customers can be split up into specialists and generalists (see Deibler, 1996). While specialists visit places with historico-culturally interesting sites because of their special historical, artistic or archaeological interests, generalists visit a destination not making culture the focal point of their journey, but consuming cultural offers among

other holiday activities. This makes clear that there is no uniform market for cultural tourism, but a market consisting of various segments. In the meantime, the World Tourism Organization estimates cultural trips to represent nearly 40% of overall tourism.

## 2. CULTURE AND TOURISM

The significance of cultural tourism is rising with the increasing crisis of traditional vacations. Travel behavior changes towards shorter and shorter holiday stays, whereas the variety of offers to choose from has increased significantly. And also the richness of many destinations' historico-cultural heritage represents a significant factor of attractiveness, which had not been taken into account for many years. Nowadays, however, it is brought up more strongly, in order to bring additional and, in particular, more interesting guest segments to the destination.

In order to comprehend cultural tourism as an independent form of travelling - and at the same time an independent form of offer - an analysis of the term "culture" is inevitable. In the end, culture as a process in the sense of the way a community sees itself is a reflection of change and complexity. It is expressed by the patterns of adaptation and learning, closely connected with social life. Culture as a product in the sense of the "productions" of a community expressing the way it sees itself, is a visible indication of changing concepts and behavior (see Richards, 1996). Therefore, it is the prime challenge of cultural management to recognize processes and productions as such. A particular problem arises from the fact that the way a community sees itself defines a certain value for cultural assets, such as castles and stately homes. This results in a specific identity with these "productions", which not always coincides with the comprehension of the market and the priorities defined by a certain guest segment. Although this coincidence is not absolutely necessary, it is important to consider the different evaluation of cultural products and productions as seen from the part of offer and from the market by means of destination management. This may be required out of consideration of the often delicate feeling of identity of a community or population, or in order to have an appropriate answer to a destination's potential of demand and market capacities (see Nuryanti, 1996).

The significance of culture within the framework of social sciences - and therefore for tourism - has strongly increased recently, due to tendencies of internationalization and globalization. A new dimension of international competition and transfer of knowledge between (tourist) destinations all over the world coincides with a massive improvement of understanding between peoples and nations. This results in a more intensive cultural interchange and a new esteem of individual cultural performances in countries, regions and tourist destinations (see Schimany, 1997). The best way to learn about culture is by means of social participation - an aspect only reinforced by the increasing mobility of people and the possibilities of access to knowledge. Cultural tourism will only become a real competitive factor for interested tourist destinations, if it is made possible to integrate travelers into the deeper (historical) reality of the visited destination, and the connections between the

past and the present time can be established. In the meantime, the need for a better overall understanding of cultural correlation has become a generic travel motive, in particular for culture trips. It represents a new challenge for destination management. The increasing trend towards short trips, on the other hand, results in the fact that culture and education is often used as a stopgap (e.g. in case of bad weather) by this type of visitors. An exception has to be made for city tourism, which more and more integrates a city's cultural offers (see Weiermair/Stainer/Auer, 1997). Nowadays, city tourism and cultural tourism are often even understood as synonyms by interested guests; a development going hand in hand with the change of cities towards visitor-friendly urban areas (see Dietvorst, 1994; Chang/Milne/Fallon/Pohlmann, 1996). Although the significance of cultural tourism is obviously growing concerning demand, tourist research is far from being able to provide clear facts in the field of motive and behavior of cultural tourists. A fact even more obvious considering specific types of people interested in culture, such as the visitors of cultural heritage, in particular castles, stately homes, palaces, churches and monasteries (see Prentice, 1993). The richness of many destinations' historico-cultural heritage does represent a significant factor of attractiveness, which had not been taken into account for many years; and nowadays it is brought up more strongly, in order to bring additional and, in particular, more interesting guest segments to the destination. The existing heterogeneity of cultural heritage, however, makes a characterization of cultural travelers very difficult, and also impedes the establishment of an appropriate product as well as its commercialization (see Middleton, 1988, from p. 22) (see Prentice).

### **3. CULTURAL TOURISM IN THE MEDITERRANEAN REGION – THE ROLE OF ITALY**

Without doubt, the Mediterranean region is one of the most important tourist destinations all over the world. Certain difficulties, however, arise at the definition of the geographic region and its catchment area, as well as at the determination of figures expressing the significance of tourism: Different initial situations of tourism in individual states, and therefore different levels of development of market-oriented products, in the countries of the Mediterranean region represent an essential obstacle for a common strategy not only in the field of cultural tourism. As has already been explained above, tendencies of internationalization result in an increased cross-border cooperation of countries. This is also valid for the countries of the Mediterranean region. On the other hand, it's just these developments which are responsible for the establishment of stronger (cultural) identity of individual countries - and more and more also individual regions. This is of great importance for the authenticity of a cultural-tourist product, but at the same time reduces the development of an individual Mediterranean identity as a basis for the creation of proper tourist products (see Nyberg, 1995).

Therefore, it is not possible to fence off the Mediterranean region along purely geographical boundaries, but cultural and bioclimatic aspects have to be considered as well. Prerequisite for a definition of the Mediterranean region is the coast of the Mediterranean Sea. This delimitation, however, implies that not the entire

territory of all respective states is necessarily part of the Mediterranean region. Nobody denies that large parts of the Mediterranean countries' territories are not only characterized by Mediterranean influences in their coastal regions. Very often this also affects the hinterland (see also "Blue Plan" of United Nations). For example, about 70% of Italy's national territory is defined as part of the Mediterranean region. One of the reasons is the fact that in the past the development of the coastal areas has mostly coincided with the hinterland. And only a small part of significant product components of the Mediterranean region's success, such as cultural tourism, affects the coastal regions themselves (see Montanari, 1995). Estimations of about 160 million arrivals explain the significance of tourism in the Mediterranean region. However, they also represent a great responsibility for its future: With its general political and social settings, the Mediterranean region represents a very delicate area of living. Ecological systems (above all the coastal areas, the sea and the forest land) loosing their balance, or military conflicts, cause severe trouble to this area (see Mikacic/Hendija/Marusic, 1999). Considering all these definitions, 24 states are part of the Mediterranean region.

Generally, the Mediterranean region's cultural heritage is one of the worlds richest treasures. In particular with cruise tourism it can be presented as a uniform destination. The disadvantage of this form of tourism, however, is the concentration of tourist streams to coastal areas and a few important cities in the hinterland. And in addition it does not result in a basis for a far-reaching cooperation of Mediterranean countries with the goal of shaping a more intensive consciousness for the problems and perspectives of the Mediterranean region. Heterogeneity of cultural heritage in different countries is also responsible for the fact that the cooperation of states and regions is not considered to be a central objective. Another essential argument for the lack of a basis for cooperation is the increasing establishment of regional identities, due to the fact that the creation of cultural-tourist products takes place more on an interregional and intraregional level than on a national level. This explains the increasing priority of national cultural policy to coordinate and promote various regional cultural identities in the framework of increasing internationalization and globalization (see Pechlaner, 1999).

Along with Spain, Italy is one of the most important states in the Mediterranean region, as regards tourist arrivals and overnight stays. However, the significance of Italy, in particular, has decreased in the last two decades in favor of other Mediterranean countries. As the Mediterranean destination that is surely most rich in tradition, Italy can fall back upon a long development and sound knowledge about dealing with cultural heritage. Its central geographic position, however, has encouraged the transference of traditional guest levels to countries such as Spain, Greece or the Balkan States (see Anastasopoulos, 1996). The abundance of historical cultural assets is not enough to cover some weak points in Italy's innovative product development. On the one hand, this can be put down to the abundance of cultural assets itself, requiring a national policy focusing on the conservation of cultural heritage - a policy extremely difficult to push through. On the other hand, it can also be put down to problems of access to cultural assets, coming out with short opening hours and a lack of public transport (see van der Borg/Costa, 1996). Local and especially regional tourist organizations play a significant role here, but are

considerably limited in their objective to create innovative tourist products, due to the strong political influence in Italy: Whereas marketing of cultural heritage is not the big problem, there are considerable weaknesses of product development and concerning the lack of infrastructure, e.g. appropriate transport systems (see Pechlaner/Socher, 1999).

Similar to the situation in other countries, in Italy the management of traditional destinations is organized in various levels. These are represented by the different levels of tourist organizations (villages and cities on a local level, geographic areas and valley communities on a regional level, provinces and regions on a provincial level, completed by the national level and a cross-border, international level). The opinion of guests concerning their interpretation of a destination, however, does not always correspond to the historically grown and politically influenced catchment areas of tourist organizations (see Jäger/Pechlaner, 1999). These different levels also have different extents of integration, which become obvious especially in case of international forms of cooperation and new cross-border destinations. Depending on the respective level, increasing transaction costs sometimes lead to problems with the coordination of product, quality and market strategies between individual levels. More than ever Italian destinations are feeling the international competition in the Mediterranean region due to the attractiveness of countries like Spain, Greece and in recent years also Croatia again. All the more, especially in Italy, regions and provinces are interested in a strong cooperation within the national boundaries in the first place, establishing international cooperation, e.g. between Mediterranean countries, only as a second step.

#### 4. CULTURAL TOURISM IN ITALY – AN EMPIRICAL ANALYSIS

In the year 1999, the Department of Management of the University of Innsbruck has carried out an empirical study about "Cultural Tourism in Italy", in order to collect data on cultural-tourist motivations concerning the side of demand, with special consideration of castles and stately homes (as an example for cultural heritage). In cooperation with the Italian national tourist office ENIT, people potentially interested in Italy, having asked for information material about the destination Italy in ENIT branches all over the world, were questioned about their knowledge and level of information concerning Italy, with special consideration of cultural-tourist motives. Main emphasis was put on the significance of cultural-tourist offers considering castles and stately homes for their decision for a certain destination as well as "consuming" the destination - as seen by interested persons during the phase of decision-making. ENIT branches had been selected according to the importance of Italy's most important source markets on the basis of 1997 figures of overnight stays. The following branches were included in the analysis: Austria (Vienna), Germany (Frankfurt, Munich), Switzerland (Zurich), France (Paris), Belgium (Brussels), Great Britain (London), USA (New York, Chicago, Los Angeles) and Japan (Tokyo). The following table gives an overview of delivered and returned questionnaires.

**Table 1: Delivered and returned questionnaires**

	<b>delivered:</b>	<b>returned:</b>	<b>percentage of returned qu:</b>
Austria	200	63	31.5 %
Germany	500	157	31.4 %
Switzerland	200	42	21.0 %
France	300	27	9.0 %
Belgium	150	34	22.7 %
Great Britain	200	76	38.0 %
USA	500	35	7.0 %
Japan	300	112	37.4 %
<b>total</b>	<b>2350</b>	<b>546</b>	<b>23.2 %</b>

In its first part, the questionnaire contains questions concerning the level of information and knowledge about the destination Italy and the origin of this knowledge or the original source of attention for the destination. In a second part there are questions concerning the motives for a planned journey, and finally, apart from personal details, some additional questions about the significance of castles and stately homes for a stay in the destination Italy as well as their significance for the travel decision.

The initial point of the study is the theory that a guest will define his/her travel destination and the area of movement during his/her stay broader and larger in direct proportion to the distance of the respective source market from the receptive market. The destination focus depends on the respective source market, but also on the origin of the guest's tourist information, namely if he or she gets them outside the destination (at home) or gets in direct contact with the destination organization, asking for special information. Therefore, there is a difference between the idea a potential guest from Germany asking for information about Italy at home or a potential guest from Japan getting this information from the ENIT branch in Tokyo have about the destination, and the idea of potential visitors having requested this information directly in the destination they would like to visit. In other words: A potential guest who already knows a destination is more likely to ask for new or additional information in the destination itself. However, he or she will probably not ask for general, but for more specific information, focused on the local feeling for the destination. This is true for European destinations, but not for distant destinations, where potential guests with increasing travel experience and knowledge about the destination ask for ever more specific information - a correlation that is not given sufficient consideration on the part of marketing. For destination management this means that different product strategies and marketing measures have to be developed according to the distance of different source markets. Of course, a different destination focus also implies a different level of interest for a cultural-tourist offer. Whereas culturally interested people with a broader destination focus (e.g. from Japan) are



more interested in historical sites, visits to museums and visits of cultural cities, visitors with a narrower destination focus (e.g. from Germany) prefer more specific offers, such as castles and stately homes.

At first we will go into some details about the culturally interested guests from Japan and Germany, showing their most important characteristics. Comparing the age-groups of potential visitors from both countries, one finds out that a majority of Japanese guests is below the age of 30, whereas the largest segments of German guests come from the age-groups between 31-45 as well as 46-60. This means that in Japan especially young people are interested in culture.

A fact also elucidated with the comparison of the answers of people surveyed concerning their occupation: There are only very few pensioners among Japanese guests, far more than half of the Japanese questioned work as civil servants or office-workers. A more detailed examination of German tourists supports the age-distribution mentioned above with the fact that nearly every fifth tourist is to be regarded a pensioner.

Another characteristic of the Japanese people surveyed and interested in culture is a very high level of education: 78 % of potential guests from Japan have a university degree, with only 50 % among German tourists. A little more than 45 % of potential German tourists to Italy surveyed has attended a vocational school or graduated from high-school.

And there are also some differences between the two guest segments questioned worth mentioning as regards travel companions: Not so many Japanese tourists who are to be considered interested in culture travel with their partners or friends. German tourists, in contrast, travel for a vacation to Italy mainly with their partners. Only very few of the German guests plan their holidays alone.

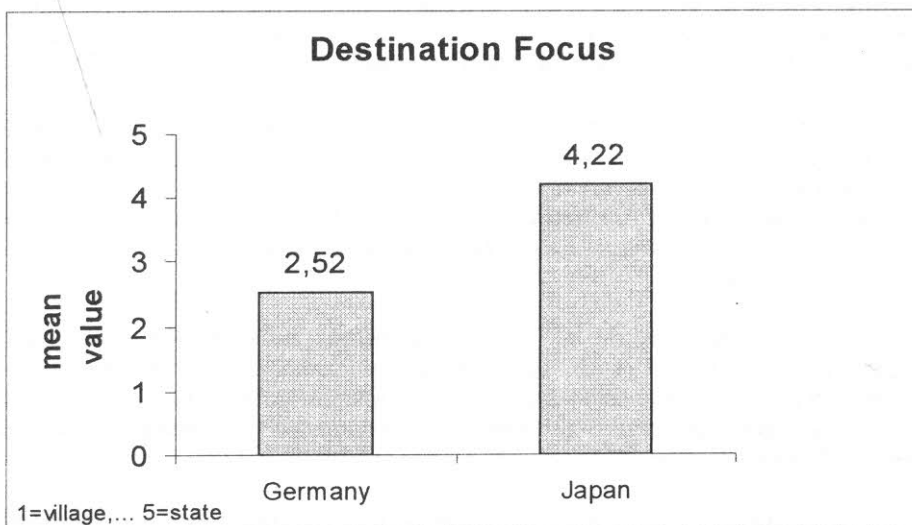
Apart from the fact that the two groups of guests examined in more detail in this study differ considerably in a number of characteristics, there is also a significant difference in their view of travel destinations as well as their ideas and wishes with regard to their planned vacation.

As has already been explained in the introduction of this paper, the potential tourists were also questioned with regard to their destination focus. In the questionnaire it was possible to indicate a destination of special interest during holiday planning, with an additional choice between local, county, regional and national level.

The types of destinations (local versus regional versus national destination) have been classified according to their precision, i.e. an indication of a local destination got the value 1. Values of classification are between 1 (for a local destination) and 5 (the national destination Italy). If a guest had indicated more than 3 local destinations located all over Italy, his or her answer was equated with the national destination. If more than 3 places in the same region had been mentioned, the answer was counted with the value for a regional destination (4). The mean value was

taken in order to make a determination of the potential guests' destination details or their scope for action possible.

### Illustration 1: Destination focus of potential guests from Germany and Japan



The illustration clearly shows that Japanese guests have considerably larger destination focuses than the people questioned from Germany. Japanese mostly see their travel destination as a region or even the entire national territory of Italy. This result also confirms the theory of the proportional correlation between the distance of emittive and receptive markets and the definition of the destination itself or the expected area of movement of guests.

If we go into more detail concerning the level of knowledge and the sources of information, the results of the study show some very clear differences between the two guest segments. The assessment of knowledge about the destination Italy already shows that the Germans have a higher level of knowledge about the destination (mean value 1.67) than the Japanese surveyed (mean value 2.06).

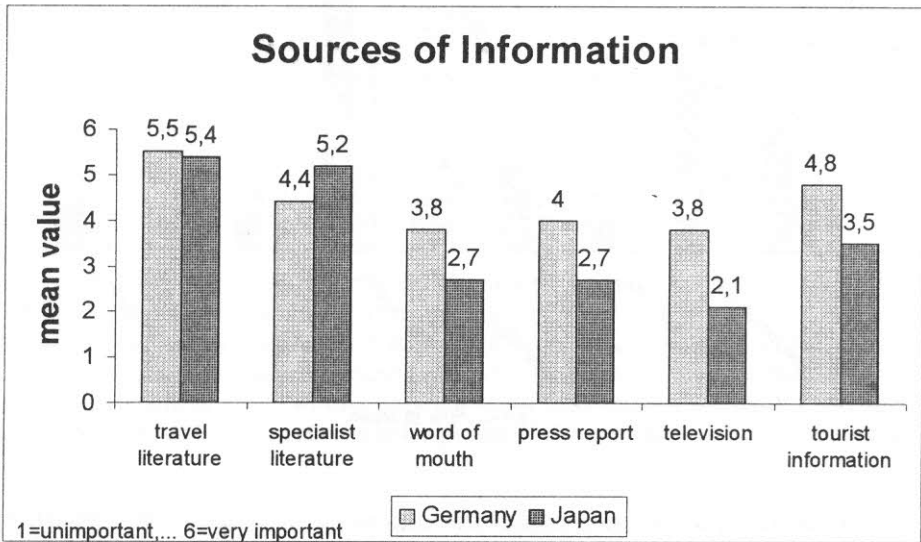
Again the mean value was taken to compare the level of knowledge in the two countries surveyed. 1 corresponds to a good level of knowledge according to self-assessment, whereas 3 stands for a low level of knowledge about the destination Italy.

Interesting differences between the two guest segments resulted from the study with regard to the sources of information about the destination Italy. For both guest segments examined, travel literature is the most important source of information. This result, however, is the only common ground the answers to this



question revealed. Japanese mainly rely on travel and specialist literature to get their knowledge about the destination Italy. German guests, on the other hand, trust more in the tourist information material as a source of information about the receptive market Italy. Considering the fact that the national tourist organization ENIT advertises more or less with the same information material and the same brochures in all markets all over the world, the results mentioned above clearly show that a differentiation of destination marketing would be very important. In addition, there are also considerable differences in the assessment of the importance of press reports, word of mouth and television.

**Illustration 2: Significance of different sources of information**

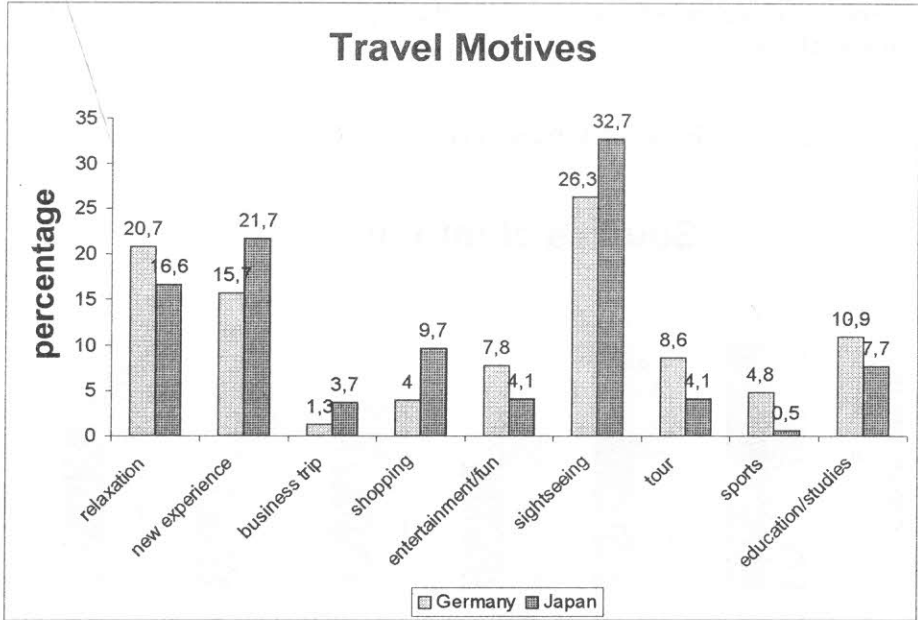


Attention for the destination Italy can be put down to different sources in the two countries, Germany and Japan. In Japan press reports (37.4 %) are very important to make people familiar with the destination Italy, although their value of information appears to be rather insignificant. In Germany every second person questioned refers to individual enquiry, such as friends or acquaintances, or his or her own experience, when asked to name the sources of attention for the destination Italy.

For both guest segments examined the most important motive for the planned trip to Italy seem to be sight-seeing tours. Especially for the Japanese, results show that it is very important to them to see new things during their journey. German tourists, in contrast, are marked by the fact that they are also looking for relaxation and recovery during their holiday stay. Therefore, the Japanese guest segments can rather be classified as specialists, potential German visitors as generalists. Especially

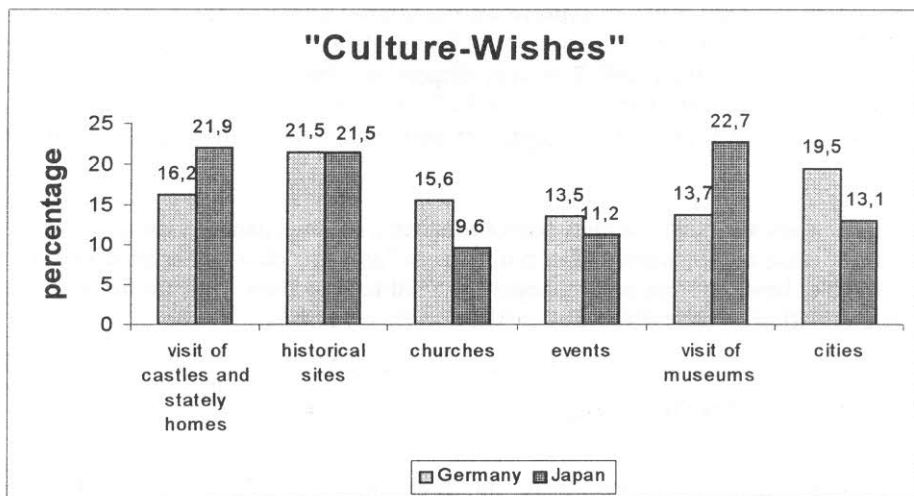
noteworthy is the fact that the Japanese consider shopping to be an essential element of their vacation.

**Illustration 3: Motives for a planned trip to Italy**



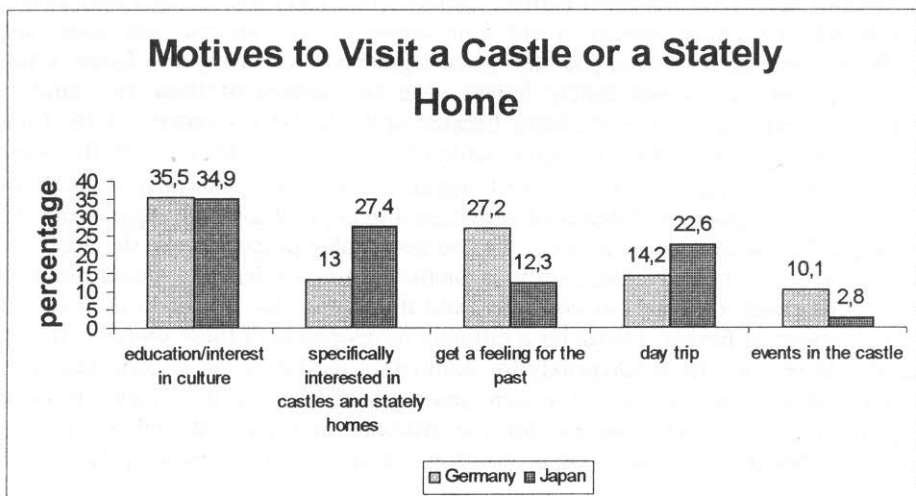
Concerning a special cultural offer, the ideas about expected experiences differ strongly between Japanese and Germans. Japanese associate mainly visits to museums, castles and stately homes, or tours to historical sites, with the cultural offer. German tourists expect something different concerning a special cultural offer: A majority of persons surveyed have the visit of historical sites in their minds; city-tours are an essential part of the cultural offer; 16 % are also interested in castles and stately homes after all. In addition, for German guests it is also important to visit churches as part of the cultural offer, whereas this aspect of culture is of little importance to the Japanese.

**Illustration 4: Wishes concerning a special cultural offer**



The reasons for a visit to a castle or a stately home are quite different for the two guest segments examined: The only common ground is the first place for "education/interest in culture" as a motive for such a cultural sight-seeing visit. For German visitors, especially experience and adventure are decisive for their visit. The answers of Japanese guests to this question show their interest for castles and stately homes. Events are no decisive reason for people from Japan to visit a castle or a stately home.

**Illustration 5: Motives to visit a castle or a stately home**



The fact that the Japanese are very interested in castles and stately homes as part of a special cultural offer is also reflected by the classification of the importance of existing castles and stately homes when deciding for a certain travel destination. People examined were asked to express the importance of the existence of castles and stately homes for their travel decision. They had to decide for a value of classification between 1 = unimportant and 7 = very important. The mean value was used to compare the assessment of importance in both nations: A higher mean value stands for a greater importance of the existence of castles and stately homes for the travel decision.

Castles and stately homes seem to matter a lot to Japanese visitors, reflected by a mean value of 5.9, whereas German tourists "only" reach a mean value of 4.5. It is noticeable, however, that both nationalities tend to base their decision for a certain travel destination on the existence of castles and stately homes.

## 5. SUMMARY AND OUTLOOK

Cultural tourism represents an ever more significant factor for the Mediterranean region. The heterogeneity of cultural heritage and the different development levels of tourism and its products in the individual regions, and also countries, however, are a considerable obstacle for a professional product development and commercialization of offers. Another decisive factor for the difficult cooperation concerning product development - always underestimated - is increasing regionalization and the corresponding regional establishment of individual (cultural) identities. This, of course, makes a coordinating cultural and tourist policy on a national and international level very difficult. The challenge for Mediterranean countries would be to improve access to cultural heritage: Improved and more customer-friendly opening hours and more efficient transport systems are an essential measure. Also in the future, cultural tourism in the Mediterranean region will be very attractive - unlike the traditional bathing holiday, and also considering international markets, which are to be worked on with more emphasis. The present study shows the significance and the interest of potential guest segments in Germany and Japan, using the example of castles and stately homes. The comparison of these two emitive markets is interesting, on the one hand, because of the fact that Germany, aside from the USA, is the most important source market for tourism worldwide. On the other hand, Japan as a typical distant travel market shows some exceptional qualities compared to European travel behavior with regard to cultural tourism. Apart from the naturally different destination focus of the two geographic target groups, the access to information on the receptive destination is another distinctive feature. Travel motives, wishes concerning a special cultural offer, and the reasons for a visit to the cultural heritage, represent further criteria for a different development of these source markets. This should be considered adequately for destination marketing on a local, regional, national and international level. The local and regional level has to concentrate more on product development, whereas for the national and international level it is necessary to bring out the main points, coordinating an efficient market appearance.

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Sažetak

**KULTURNI TURIZAM KAO KONKURENTNI ČIMBENIK U  
MEDITERANSKOM TURIZMU -  
Komperativna studija japanskog i njemačkog izvornog tržišta za talijansku  
kulturnu baštinu**

*Mediteran je osjetljivo područje za život, izloženo ozbiljnom problemu koji može biti izazvan i neznatnim utjecajem npr. vojnim konfliktima. Zbog toga je potrebno tražiti korisna dugoročna rješenja za turizam u zemljama tog područja. Zbog obilja kulturnog bogatstva kulturni turizam postaje još važniji. S druge strane, slabe točke razvoja proizvoda i marketinga bivaju očividni unatoč velikoj potražnji. Ova empirijska studija utvrđuje potrebe ljudi, potencijalno zainteresiranih da posjete Italiju s primjerom izvornih tržišta Japana i Njemačke, osobito u svezi kulturnog turizma sa specifičnim naglaskom dvoraca i otmjenih obiteljskih kuća. Nakon što smo utvrdili te potrebe biti će moguće pokazati potrebna djelovanja za razvoj proizvoda i marketinga na lokalnoj, područnoj, nacionalnoj i međunarodnoj razini.*

*Ključne riječi: kulturni turizam, mediteranski turizam, dvorci i otmjene obiteljske kuće, izvorna i prijemljiva (receptivna) tržišta.*