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CITY TOURISM & CULTURE

THE EUROPEAN EXPERIENCE

A Report of the Research Group of the European Travel Commission
and of the World Tourism Organization

ETC RESEARCH GROUP

CITY TOURISM & CULTURE
THE EUROPEAN EXPERIENCE

A Report produced for the Research Group
of the **European Travel Commission (ETC)**
and for the **World Tourism Organization (WTO)**
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Executive Summary

During the last decades city tourism and especially city-based cultural tourism have become of increasing importance for national and city tourism organizations and cultural institutions in Europe. For this reason the European Travel Commission (ETC) and the World Tourism Organization (WTO), have commissioned this study on leisure tourism to European cities with a cultural motive.

Purpose of the study

The purpose of this study, as stated in the Invitation to Tender, is to increase the knowledge on cultural city trips for the members of ETC (the National Tourist Organizations in 33 European countries), for individual European cities/tourist offices, and for the WTO members. The main objective of the study is to create a conceptual framework with a structural approach that can be broadly used in practical marketing, especially communication, and product development. In addition to this, the study consists of an inventory and analysis of available quantitative data on city tourism and culture and a qualitative survey of the supply side.

The design of the study

The design of the study consisted of four main steps, namely:

- desk research on cultural city tourism including an overview of the main research, studies, books and other relevant publications covering city tourism and culture. Input for this part of the research came mainly from the National Tourism Organizations represented in ETC. A bibliography of the relevant cultural city tourism publications has been included in appendix 2;
- a conceptual framework for cultural city tourism based on information gathered in step 1 and the research team's knowledge and insights regarding city cultural tourism;
- analysis of quantitative data from existing sources with regard to city tourism with a cultural motive;
- analysis of qualitative data on cultural city tourism from key players and stakeholders in the market. The qualitative data have been focused on market-oriented data, on problems and possible solutions and on opportunities and threats related to city tourism with a cultural motive. The two main instruments used to gather this information were:
  - an Internet poll amongst key players such as incoming and outgoing tour operators, airlines, coach operators, tourist offices, cultural institutions, etc.;
  - roundtable workshops with a selection of key players. In total three workshops were held in Amsterdam, Barcelona and Vienna. A list of the persons who participated has been included in appendix 3.

The content of this report

This study consists of six chapters. In chapter 1 the definition of cultural city tourism and the conceptual framework used in this study are presented. The focus of chapter 2 is on the quantitative data based on four data sources on cultural city tourism, namely TourMIS, IPK International, ATLAS and EUROBAROMETER. In chapter 3, 4, 5 and 6 the results of the qualitative market research are presented. A description of the research method, the response and the questionnaire are presented in appendix 4 and appendix 5 and the detailed outcome of the questionnaire is presented in appendix 6.

The results of the qualitative market research are clustered in four chapters, namely:

- chapter 3: focuses on the volume of cultural city tourism and volume related developments;
- chapter 4: focuses on the marketing of cultural city tourism;
- chapter 5: focuses on cooperation in the field of city tourism and culture;
- chapter 6: the final chapter, summarizes the main opportunities for city tourism and culture in Europe.

City tourism and culture

In this study two definitions have been used for cultural tourism to cities, namely:

(1) the movement of persons to cultural attractions in cities in countries other than their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs and (2) all movements of persons to specific cultural attractions, such as heritage sites, artistic and cultural manifestations, arts and drama to cities outside their normal country of residence. In order to structure the way cities can be looked at as destinations for cultural tourism a framework has been developed based on the predominant (cultural) product of a place and the type of place, such as village, town, city and metropolis.

Framework to classify places and their cultural product

Product category / Type of place	Village	Town	City	Metropolis
Heritage	Cluster 1	Cluster 2		
Heritage + The Arts		Cluster 3	Cluster 4	
Heritage + The Arts + Creative Industries			Cluster 5	Cluster 6

In this framework 'Heritage' refers to places with cultural heritage as the predominant cultural product. 'Cultural' (or the arts) refers to the (contemporary) performing and visual arts of the place and thirdly 'Creative' refers to the creative industries, such as (graphic) design, fashion, contemporary architecture etc. The framework is not intended as a strict categorization, but as a way to cluster city destinations according to a cultural motivation. This study focuses primarily in towns, cities and metropolises.

Quantitative data about city tourism and culture

In order to provide a more comprehensive picture of the consumption of culture by tourists visiting European cities, four data sources have been analyzed.

City tourism and cultural capitals - TourMIS

TourMIS, the Tourism Marketing Information System is a database of the Austrian National Tourist Office and of the Institute for Tourism and Leisure Studies (ITL) at the Vienna University of Economics developed in collaboration with the European Travel Commission (ETC) and European Cities Tourism (ECT) providing data on tourism volumes (arrivals and bednights). The TourMIS data used in this study (bednights), shows a steady rise in city tourism up to a peak in 2000, with a decline thereafter. In the period 1996 - 2003 domestic and European tourism have performed better than other foreign arrivals. Within European tourism London and Paris (both in cluster 6) have shown the most consistent growth in bednights over the last ten years up to 2000, compared to other larger cities. Smaller cities in other clusters such as cluster 2, 3 and 4 have proven to be more stable and showed a lesser decline in bednights. Regarding Cultural Capitals, the TourMIS data shows that the impact is not the same for each city and that even though each city shows a boost in the number of bednights, most cities already show a decline in the year after having been Cultural Capital.

Generating markets and destination countries - IPK International

The IPK data is derived from the European Travel Monitor (2002), measuring the outbound travel demand and travel behaviour of more than 30 European countries. An analysis of the outbound city holiday trips data shows that a few large countries - France, UK and Germany - dominate both in generation and reception of city tourism in 2002. Smaller, richer countries in North Western Europe make the largest relative contribution to the market of city holiday trips and the data shows that there is a strong relationship between income groups and city tourism: those in the highest income groups are more likely to make a city trip than those in the lower income group. The IPK data also shows a tendency for city holiday trips from neighbouring countries of origin, with the exception of Spain where the major countries of origin are the UK and Germany.

Visitor profiles, motivations and activities - ATLAS & EUROBAROMETER

ATLAS is an international association of higher education and other organizations, aiming to develop transnational education and research in tourism and leisure. ATLAS data is based in 30,000 surveys made between 1992 and 2001 on over 200 sites of cultural attractions across Europe. The EUROBAROMETER survey was carried out in 1997 through household surveys in each European Union (EU) country with a sample of 8,700 people.

The ATLAS research shows, not surprisingly, that the level of education for those visiting attractions is relatively high. Data on the age of the visitors, however, showed that it is not merely older people visiting cultural attractions, but young people also make up a large proportion of visitors and they tend to visit cultural attractions in those cities relatively frequently. Museums were by far the most popular attractions visited by all visitors. This was also confirmed by the IPK finding that the most important traditional cultural activity is visiting museums. The largest group of people interviewed were on a city trip and smaller groups were joining either a touring holiday or a cultural holiday. Other types of holidays (sun/beach, countryside) were much less frequently mentioned. The most important reason to visit a cultural attraction is learning about history and enjoying the atmosphere. The activities undertaken by city visitors were also monitored by IPK. IPK data showed that sightseeing and visiting objects of interest are the most popular activities undertaken during trips, whereby sightseeing is considered ‘cultural’. Family and friends were the most important information source used for booking the trip, followed by Internet and guidebooks. For the actual booking ‘own arrangements’ were most important, followed by all-inclusive packages.

The EUROBAROMETER data shows that the natural environment is considered a more important motivator for travel compared to history and that culture and historic towns and monuments were the most important attractions visited on holiday. The smaller countries in Central and Eastern Europe tend to be visited primarily for cultural reasons, whereas those with more diversified products also tend to attract rural tourism and beach tourism. When looking at the visitors profile, the data shows that visitors to cities are drawn heavily from people under 35 and that the educational level of visitors is relatively high.

There are limited possibilities to compare the data of the four different studies used, because each is based on a different methodology and data source. Some overall conclusions can, however, be drawn based on these four data sources:

- Visitors tend to be predominantly female, highly educated with professional of managerial occupations and relatively high incomes;

- Cultural tourism in cities is an activity followed by all age groups, with the peak age group in terms of participation between 20 and 30;
- Those over the age of 50 tend to visit more cultural attractions than younger tourists;
- Culture is the single most important motivation for city trips, although relatively few visitors view themselves as 'cultural tourists';
- Cultural events tend to be much less important than fixed attractions in city visits;
- The most important source of information is personal recommendation from family or friends, but the influence of the Internet is rapidly growing;
- City cultural tourists travel frequently by air and tend to stay in hotels;
- The recent decline in foreign arrivals in European cities has been partly compensated by strong domestic demand;
- Although city cultural tourism continues to be dominated by the established 'cultural capitals' there is evidence of trends towards more trips to smaller destinations and new regions of Europe.

Qualitative data about city tourism and culture

In order to get a better understanding of the city cultural tourism field and the developments affecting it, qualitative research was conducted based on an Internet poll amongst key players such as incoming and outgoing tour operators, airlines, coach operators, tourist offices, cultural institutions, etc. and on roundtable workshops with a selection of key players.

Cultural city tourism: a growing market

From this research it is apparent that the respondents expect growth in the cultural (city) tourism market, primarily from Asia. However, they also expect increased competition between European cities and more competition for European cities from cities in Asia and in North and/or South America. This anticipated growth in cultural city tourism will have a positive economic effect. However, the respondents were of the opinion that destinations do not always consider the possible negative effects of large numbers of tourists and that an imbalance between the number of tourists and the number of inhabitants can lead to a decrease in the hospitality level. This can negatively affect the (experience of the) cultural heritage a place has to offer. Cities therefore need to develop a clear strategy regarding the way they want to develop tourism, especially for historical inner cities and locations on the World Heritage List. Visitor management offers possible solutions to this potential imbalance.

The marketing of city tourism and culture

As a result of the anticipated increased competition between cities in Europe effective marketing of the city cultural tourism product will become increasingly important. The respondents in the research are of the opinion that effective marketing of a place as a cultural destination can significantly increase the number of tourist arrivals but that the current marketing of places as cultural destinations in Europe is not of a high level. Furthermore they are of the opinion that cultural tourism in Europe is traditional rather than innovative and that the traditional cultural cities will loose market share in favour of (new) destinations with new and/or innovative cultural products and services. In light of the convergence of the inner circle of cultural tourism (heritage and arts tourism) and the outer circle (lifestyle and the creative industries), combined with the importance of young cultural tourists for cities and the discerning nature of the cultural city tourist in general, product development will become increasingly important for cities who want to offer a differential advantage and thereby stay ahead of the competition. City cultural tourism related product development can range from the potential offered by cultural diversity and ethnicity, culinary culture, fashion and design to signature architecture for cultural institutions, cultural festivals and events.

Cooperation and city cultural tourism

Cultural city tourism covers both the cultural sector as well as the tourism industry. Although cooperation between these two branches is essential it is, however, not always easy as they both have their own language and specific objectives. In order to create a better mutual understanding and cooperation, the two branches need to develop a structured dialogue in order to better understand each other's needs and goals. One way of getting parties from both branches to work together is the development of cultural theme years. Most cities, with the exception of the large metropolises such as Paris and London, work with themes to promote cultural tourism. Promotional themes can be stand alone, but also in a cluster of cities and/or places. Themes are also increasingly used to develop itineraries or routes between cities (themed routes).

Opportunities for cultural tourism

From the quantitative and qualitative research the following opportunities for city cultural tourism were identified:

- Only 20% of city tourists rate culture as their prime motivator, but a far greater number is actually involved in cultural activities while on a city trip. A large number of city trippers do not see themselves as (city) cultural tourists. The so-called purposeful cultural tourist and the sightseeing cultural tourist therefore need to be addressed and communicated with in a different way and on a different level as their motivations differ strongly;
- For some visitors culture is the prime reason for travel, while for others it is the decor (especially the cultural heritage) in which a visit takes place. In both cases culture plays an important, but very different role;
- The demographic developments in Europe during the coming 10 to 15 years strongly favour cultural tourism as the group of potential travellers older than 55 years will grow significantly;
- Innovation is important for keeping a place on the cultural tourism map and for attracting repeat visitors due to the increasing competition between cities;
- Cultural (mega) events and festivals offer interesting opportunities for city destinations in attracting both first time and repeat visitors;
- With the increasing globalization and mass production leading to greater uniformity worldwide, the value of authenticity, or even faux authenticity will become increasingly important for cultural tourists;
- For large cities and metropolises the concept of the creative city, linking the traditional cultural products, services and heritage with the creative industries such as media and entertainment, design, architecture and fashion, can offer great advantages in attracting visitors;
- More in-depth and comparable data concerning cultural city tourism will be needed in the future in order to better understand and react to the fast changing market.

Finally, due to the complexity of the subject city tourism and culture an executive summary can only touch the surface of the subject. To get a good understanding of the subject the report needs in fact to be read in its entirety. In addition it is important to realise that this document is a 'living document' and that it is a start to aligning information and insights on city tourism and culture in Europe. As additional information becomes available and as data becomes more comparable the insights and strategies offered in this document will need to be worked out in further detail and finetuned.

Chapter 1

City Tourism and Culture

This chapter outlines the starting point of this study. The fist paragraph opens with considerations concerning the definition of cultural tourism resulting in two definitions being used in this study. After that a theoretical framework is presented in which the large number of countries, cities and aspects related to cultural tourism in Europe are reduced to a manageable and structured framework. The framework forms the basis of this study.

1.1 City Tourism and Culture: What is it?

Defining cultural tourism

There are a great number of definitions of cultural tourism in use, resulting in different definitions being used in research studies related to cultural tourism and in the field of cultural tourism. Or as McKercher and Du Cros (2002) responded to the question *"What is cultural tourism? This seemingly simple question is actually very difficult to answer because there are almost as many definitions of cultural tourism as there are cultural tourists."* This complicates the discourse about cultural tourism, as it is not always clear if we are in fact talking about the same subject. Furthermore, the use of differing definitions makes it difficult to compare the various statistics related to cultural tourism.

For this reason the initial step in this study is the choice of a definition of cultural tourism that is most suited, taking into consideration the following three aims set by ETC and WTO for this study:

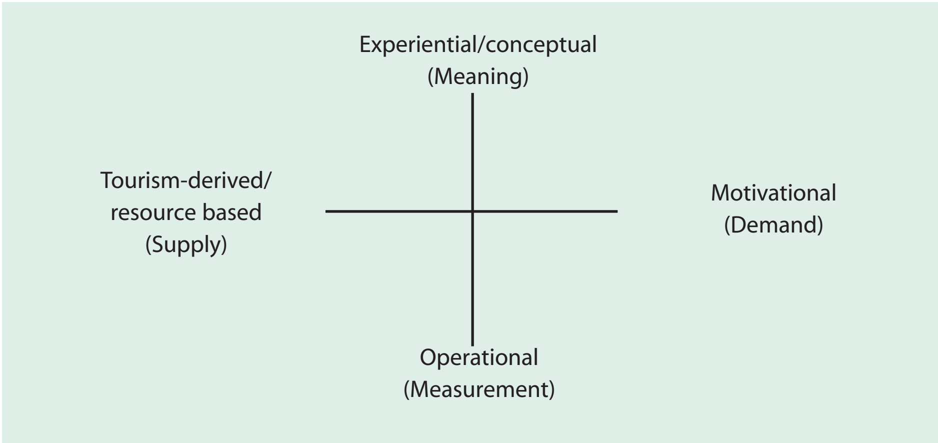
Aim 1
The development of a conceptual framework that can be used by ETC, WTO and the member countries of ETC with regard to the marketing and product development for city tourism with a cultural motive.

Aim 2
An inventory and comparison of quantitative data based on existing data on city tourism with a cultural motive.

Aim 3
Gathering qualitative marketing information based on interviews and market research with regard to problems and solutions, opportunities and threats related to city tourism with a cultural motive.

In the chapter 'What is cultural tourism' of the Dutch publication 'Erfgoed voor toerisme'(2003)[1] Richards outlines four types of cultural tourism and the advantages and disadvantages of these definitions. The four definitions are originally from McKercher and Du Cros based on a review of definitions they made. The four types are: tourism derived definitions, motivational definitions, experiential or aspirational definitions and operational definitions. The different approaches of these definitions can be placed at opposite ends of two axes as shown in the figure (see Figure 1).

Figure 1 Division of definitions of cultural tourism



On the vertical axis the experiential/conceptual definitions indicate the nature of the cultural tourism experience in conceptual terms - what does it actually mean? At the opposite end the operational definition is used to identify the cultural tourist and often used to measure the scale or scope of cultural tourism activity. The vertical axis is therefore the measurement-meaning axis. In other words the ends of the axes are differentiated by understanding the nature of cultural tourism and its meaning and by counting the number of cultural tourists.

The horizontal axis has at one end the tourism-derived definitions looking at cultural tourism from the perspective of the tourism industry or the tourism system. At the opposite end the primary focus for motivational definitions are the tourists themselves and their reasons for travel. So this axis deals with supply and demand in relation to cultural tourism as a segment of the tourism industry and the demands of the cultural tourist.

As is to be expected there is not one single definition of cultural tourism that is generally accepted (Huges, 2002)[2] . The most appropriate definition is the one that best suits the task in hand. Parts of the objective of the study posed by the ETC and WTO (aims number 1 and 3) focus on city tourism with a cultural motive as an element of the tourism system. This requires a conceptual definition. The other part (aim number 2) focuses on measuring the volume of city tourists with a cultural motive. This requires an operational definition.

Choosing a definition

Having studied the definitions used in various relevant research projects and by organizations involved in cultural tourism we have identified two definitions for this study, both based on the definitions used by the Association for Leisure and Tourism Education (ATLAS), namely:

Definition 1: a conceptual definition of cultural tourism to cities
The movement of persons to cultural attractions in cities in countries other than their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs.

Definition 2: an operational definition of cultural tourism to cities
All movements of persons to specific cultural attractions, such as heritage sites, artistic and cultural manifestations, arts and drama to cities outside their normal country of residence.

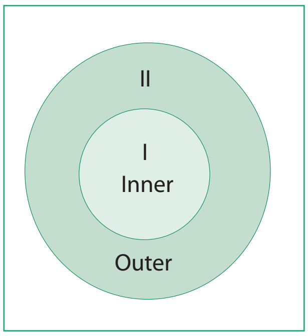
The difference between the two definitions and the original definitions of ATLAS is that the two definitions are limited to cities in foreign destinations, thereby excluding domestic tourism from this study. Furthermore, the focus is on tourism to towns and cities and not to villages and/or the countryside.

The reason for choosing the ATLAS definitions as the basis for this study instead of, for example, the definitions used by the WTO, is that (1) the ATLAS definitions are relatively concrete, (2) they are not so broad that they are in fact inclusive of all forms of tourism and, for the first definition, (3) the concept of culture is broadly defined (cultural attractions can include both fixed and mobile attractions as well as intangible aspects of the product such as 'atmosphere'). In recent years the scope of the ATLAS surveys has widened to include more cultural events and 'popular' cultural attractions as well as 'high' culture attractions.

The definition of the complex word "culture" further complicates the definition of cultural tourism. Culture as presented in the definitions, not only consists of traditional culture, such as visiting museums, the performing arts, galleries, cultural heritage, etc., but it is also includes the way of life of people living in a certain area, including aspects such as language, beliefs, cuisine, dress, customs etc. and the products that arise from it (for example architecture, artefacts and the related atmosphere). According to Howard (2002), cultural tourism consists of several dimensions "*historical and contemporary (time), objects and performance (type), contextual and non-contextual (travel) as well as wide or narrow (scope)*". Furthermore, he states that "*the term cultural tourism is applied to any or all of these but the diversity means that it will be difficult to treat visits to them all as an entity. It may be misleading to analyze all within the same broad category of cultural tourism and, at least initially, more worthwhile to isolate each as separate forms of tourism*" (Howard, 2002). True as this may be, it is currently not realistic to do so for this study as the existing statistics on cultural tourism in Europe are so general.

Figure 2 illustrates how the concept of culture is defined for this study. Culture is separated into an inner and outer circle. The inner circle represents the cultural core, the more traditional or basic elements of culture representing what people make or produce in cultural terms. The outer circle represents the way of life or lifestyle of a place or region. Both the inner and the outer circle are object of research in this study.

Figure 2 The inner circle and the outer circle of cultural tourism



I. The *inner* circle represents the primary elements of cultural tourism which can be divided into two parts, namely heritage tourism (cultural heritage related to artefacts of the past) and *arts tourism* (related to contemporary cultural production such as the performing and visual arts, contemporary architecture, literature, etc.).

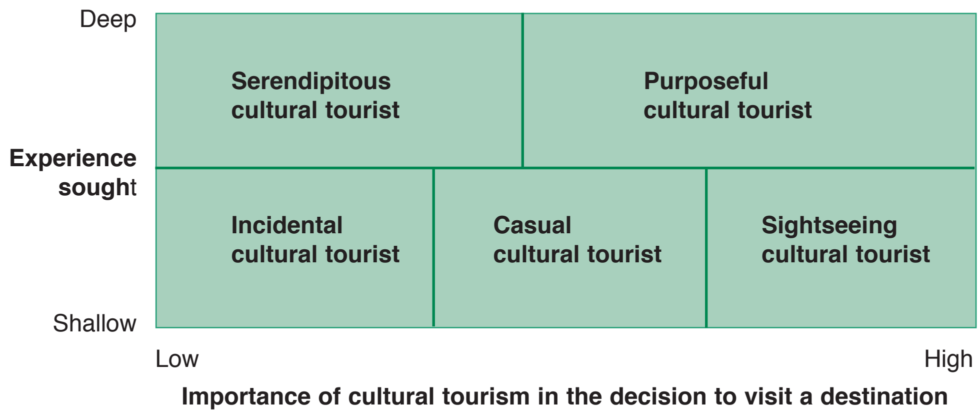
II. The *outer* circle represents the *secondary elements* of cultural tourism which can be divided into two elements, namely *lifestyle* (elements such as beliefs, cuisine, traditions, folklore, etc.) and the *creative industries* (fashion design, web and graphic design, film, media and entertainment, etc.).

In many places the inner and outer circles are increasingly converging and from the point of view of the cultural tourist they form often an inextricable whole. In his book "The Rise of the Creative Class", Richard Florida (2002) shows how in cities, traditional culture (the arts and cultural heritage) and the creative industries (fashion designers, advertising, web and graphic designers, etc.) increasingly influence and depend upon each other, and *"creative centres provide the integrated eco-system or habitat where all forms of creativity - artistic and cultural, technological and economic - can take route and flourish."*

1.2 City Tourism and Culture: Who is it About?

Focusing on the different types of cultural tourist is another way to handle the definition problem of cultural tourism. Just as with the definitions of cultural tourism, there is more than one typology being used. Richards (2003) names among others the typology of McKercher and Du Gros who differentiate the different types of cultural tourists not only by the importance of culture in their decision to travel, but also the depth of experience. The five types are:

Figure 3 Typology of cultural tourist by McKercher and Du Cros



- **The purposeful cultural tourist**
  Cultural tourism is the primary motive for visiting a destination and the tourist has a very deep cultural experience;
- **The sightseeing cultural tourist**
  Cultural tourism is a primary reason for visiting a destination, but the experience is less deep;
- **The serendipitous cultural tourist**
  A tourist who does not travel for cultural reasons, but who, after participating, ends up having a deep cultural tourism experience;
- **The casual cultural tourist**
  Cultural tourism is a weak motive for travel and the resulting experience is shallow;
- **The incidental cultural tourist**
  This tourist does not travel for cultural reasons, but nonetheless participates in some activities and has shallow experiences.

In the qualitative part of this study we will focus primarily on the first three types of cultural tourist (the purposeful cultural tourist, the sightseeing cultural tourist and the serendipitous cultural tourist) because for these cultural tourists, culture is of (a relatively) high importance in choosing their destination (main motivator) and/or a deep experience is sought/had. In the quantitative part it is not possible to make such a distinction, as the available surveys are not designed to measure the depth of cultural tourism experiences. The chapter concerning the quantitative data therefore focuses on city tourism and culture on a general level.

1.3 City Tourism and Culture: Which Cities is it About?

The participants of this study are the 33 ETC member countries, which are also most of them WTO members, resulting in far more than 100 cities that are in a broad sense, the object of this study. A framework has therefore been developed to supply the various countries, cities and related tourism organizations with a guideline whereby they can better realize the potentials of cultural city tourism. The bases of the concept are the clusters that exist at the intersection of the vertical and horizontal axes in Figure 4, namely the predominant *(cultural)* product (i.e. heritage, the arts and creative industries) and the type of place (i.e. village, town, city or metropolis). The product on the vertical axis is defined as follows:

- **Heritage:** the predominant cultural product is the *cultural heritage (artefacts relating to the past)* of the place;
- **The Arts:** the predominant cultural product is the *contemporary performing and visual arts* of the place;
- **Creative Industries:** the predominant cultural product is the *creative industries* (i.e. design, fashion, contemporary architecture, advertising, etc.).

Empirically, we have identified three product *categories* consisting of one or more of these elements that are to be found in Europe, namely:

- product heritage;
- product heritage and the arts;
- product heritage + the arts + creative industries.

Figure 4 Framework to classify places and their cultural product

Product category / Type of place	Village	Town	City	Metropolis
Heritage	Cluster 1	Cluster 2		
Heritage + The Arts		Cluster 3	Cluster 4	
Heritage + The Arts + Creative Industries			Cluster 5	Cluster 6

Figure 4 shows the framework in which the product categories are related to the types of place. In the framework the types of places are not precisely defined. It is intended as a way of looking at the places and their cultural products, rather than a strict categorization. The continuum of the types of place can be seen as a sliding scale from small to large. In this perception villages can be seen as of local importance, towns of regional importance, cities of national importance and metropolises of international importance. They also form a continuum on the scale of the types and complexity of the cultural (and other) products and services offered by and consumed in the place.

The primary types of places that this study focuses on are *towns, cities and metropolises.* Parts of this study also include villages, but only in order to make the differences between villages and towns, cities and metropolises clearer.

The framework is further based on a number of assumptions that are true for most European villages, towns, cities and metropolises when talking about foreign cultural tourists, but possibly not for all.

- V*illages* only offer cultural heritage (cluster 1) and no or very limited visual arts, performing arts or the creative industries;
- T*owns* offer cultural heritage (cluster 2) and the visual and/or performing arts (cluster 3), but no or very limited creative industries;
- C*ities* offer cultural heritage and the performing and/or visual arts (cluster 4) and possibly the creative industries (cluster 5);
- M*etropolises* offer cultural heritage and the performing and/or visual arts and the creative industries (cluster 6).

These assumptions are not always valid for domestic tourism, which does not form part of this study. In addition, it is assumed that on the whole, villages, towns, cities and metropolises that do not offer a combination of products and services for foreign cultural tourists, do not have an attractive product for the development of cultural tourism and they therefore do not form part of this study.

The Table 1 shows a classification of some cities in countries that are members of ETC. The classification is based on the expertise of the LAgroup and Interarts and is intended only to be indicative. For example, the cities that fall under cluster 4 and 5 are largely dependent upon the presence of the creative industries in these cities. As limited statistics are currently available for this area the categorization is not based on hard facts. Various research organizations in Europe are currently collecting and analyzing comparative data in this field.

As this data becomes available the table will then need to be further finetuned. The classification of the places in Table 1 has been based on a combination of the following factors: (a) the size of the place geographically and in terms of the number of inhabitants, (b) the cultural products offered in terms of absolute numbers and importance/attractiveness to visitors as rated by guide books such as the Michelin Green Guide (where available) and (c) the knowledge and expertise of LAgroup and Interarts. The decision to include the table, though possibly risky, was made in order to give more substance to the framework and to start the debate concerning the framework and the classification of places. As this is a 'living document' the classification within the framework will need to be continually revised and finetuned as additional data becomes available.

Table 1 Classification of some European cities according to the framework

Cluster 2 (town with heritage)	Cluster 3 (town with heritage + the arts)	Cluster 4 (city with heritage + the arts)	Cluster 5 (city with heritage + the arts+ creative industries)	Cluster 6 (metropolis with heritage + the arts+ creative industries)
Avila	Avignon	Athens	Amsterdam	Berlin
Bamberg	Basel	Antwerp	Barcelona	Istanbul
Bern	Bayreuth	Bucharest	Brussels	London
Canterbury	Bologna	Edinburgh	Budapest	Madrid
Cordoba	Bratislava	Glasgow	Copenhagen	Paris
Delft	Bruges	Hamburg	Dublin	Rome
Granada	Florence	Helsinki	Lisbon	
Heidelberg	Gent	Porto	Lyon	
Luxembourg	Krakow	Prague	Milan	
Oxford	Ljubljana	Riga	Munich	
Monaco	Oslo	Rotterdam	Naples	
Nicosia	Santiago de Compostela	Salzburg	Stockholm	
Pisa	Sofia	Seville	Vienna	
Siena	Tallinn	Warsaw		
Valleta	Venice			
Würzburg	Vilnius			
York	Zagreb			

Endnotes:

1 Details concerning this book are contained in appendix 2. NB, the chapter by Richards is written in English.
2 A selection of definitions of cultural tourism that are being used by different organizations is included in appendix 14.

Chapter 2

Quantitative Data on City Tourism and Culture

In this chapter quantitative data on city tourism and culture is presented. The data provides marketing information for the development of cultural city tourism in Europe.

In order to provide a more comprehensive picture of the consumption of culture by tourists visiting European cities, four data sources have been compared. The first is the TourMIS database, which, in collaboration with ECT, reports tourism volumes to most of the major urban tourism destinations in Europe. TourMIS provides data over a long time period, allowing analysis of trends in city tourism over the past decade, although it contains no specific data on cultural activities. Secondly, the analysis draws on data from the European Travel Monitor for 2002, conducted by IPK International. This allows a more comprehensive picture of European city tourism to be constructed, since it covers more countries than the previous surveys. However, these data are limited by the fact that only tabulations are available, which does not allow an analysis of the raw data. The third data source is the ATLAS surveys conducted in different European cities between 1992 and 2001 and the fourth is the EUROBAROMETER survey of European tourism consumption held in 1997. The ATLAS data are based on a sample of visitors to cultural attractions and the EUROBAROMETER data are derived from regular household surveys conducted by the European Union (E.U.). In 1997 this included specific questions on tourism consumption, including cultural motivations and activities. The EUROBAROMETER survey therefore gives a picture of the proportion of the population that engaged in cultural visits in European cities in 1997, whereas the ATLAS data provide a more detailed analysis of the behaviour of cultural visitors in cities over a longer period of time. By combining these four data sets, some conclusions can be drawn about the importance of culture in city tourism as a whole, as well as more specific information on the behaviour of cultural tourists (those visiting cities for cultural reasons).

Data comparability of the four data sources

There are limited possibilities to compare the data used in the four different studies, because each is based on a different methodology and data source. The TourMIS system makes use of official tourism statistics from city tourist offices, which in turn are derived from other sources, such as hotels. The IPK International and ATLAS data are derived from surveys, but the IPK International studies are done in the countries of origin, whereas the ATLAS data is collected in the destination. The IPK data cover city trips only, and exclude visits to cities made as part of a touring holiday. The ATLAS study is the only data source which specifically addresses cultural tourism, whereas cultural consumption is just one element of the IPK International and EUROBAROMETER surveys. All of the studies also use different definitions of cultural attractions, besides being based on different socio-demographic categories. Comparisons between these data sources can therefore only be made in the most general terms, for example in comparing general trends in city stays or visits to museums.

2.1 TourMIS

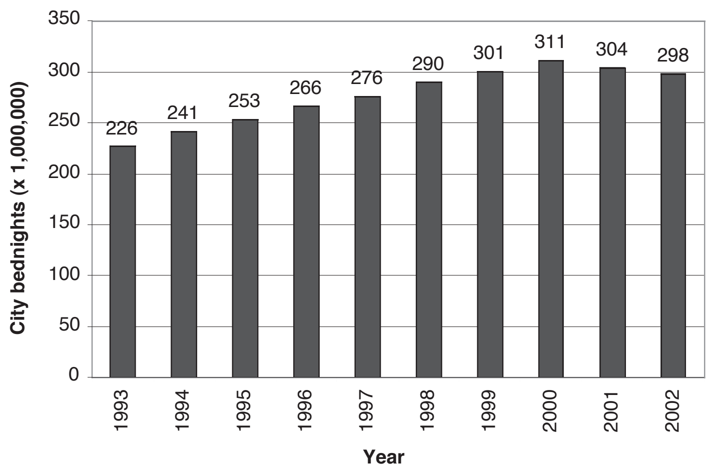
This Internet based system (www.tourmis.info) provides regularly updated data on the volume of tourism to a large number of cities, with the basic data being supplied by city tourist offices. Data are collected on visitor numbers, bednights, turnover and occupancy. ‘Bednights’ include all types of accommodation units. The most complete data series are available for hotel overnights.

2.2 TourMIS Data Analysis

As TourMIS only collects data on tourism volumes, it cannot be used to analyze the cultural consumption of tourists, but it does give a useful picture of city tourism generally. In particular, it provides a useful comparison with the IPK International data on the total volume of city trips.

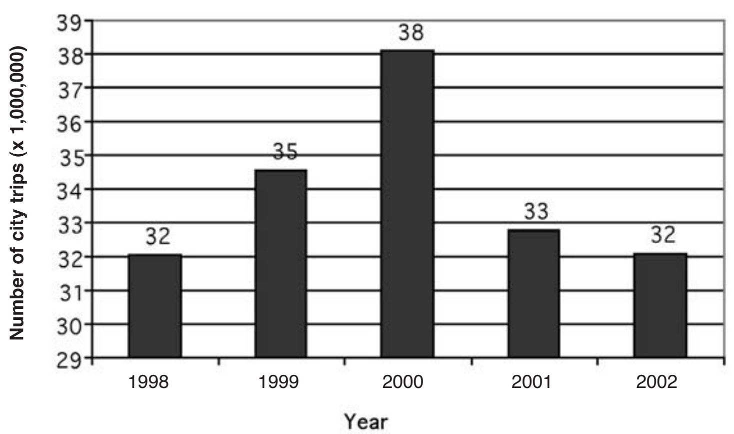
As the number of cities reporting data to TourMIS vary from one year to another, in order to study underlying trends it is useful to analyze 'consistent reporters'[1] only, that is those cities which have supplied data consistently over a number of years. Figure 5, indicates a steady rise in total bednights up to a peak in the year 2000, with a decline thereafter. If the TourMIS data are compared with the IPK International data (see Figure 6) for the period they are both available, a very similar trend emerges. It is likely that a variety of factors have contributed to this trend, including the Millennium celebrations in 2000, and the subsequent effects of September 11, 2001. Initial results for 2003, however, show a reversal of the decline, with total bednights rising by just under 3%, with international arrivals outstripping total growth in world tourism arrivals.

Figure 5 City bednights - consistent reporters



Source: TourMIS

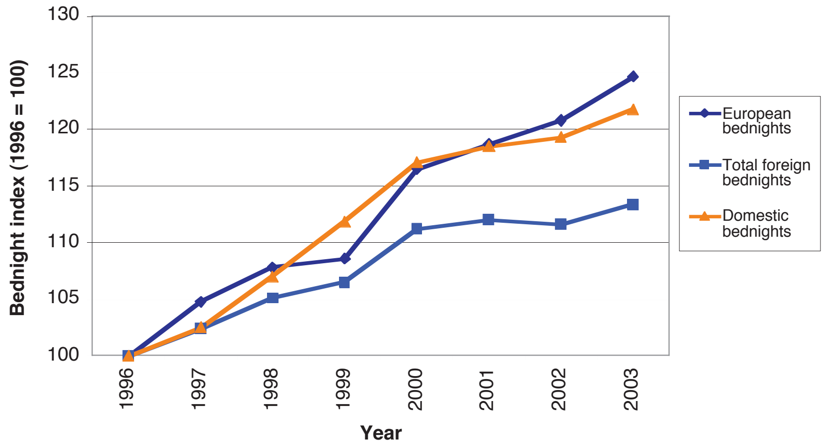
Figure 6 All outbound city trips



Source: IPK International

If the TourMIS data are analyzed for different markets, it can be seen that domestic and European city tourism have performed better than other foreign arrivals (Figure 7). The growth of bednights generated by European markets has been particularly strong, growing by almost 25% between 1996 and 2003. Bednights from other parts of the world grew less strongly, particularly since 2000.

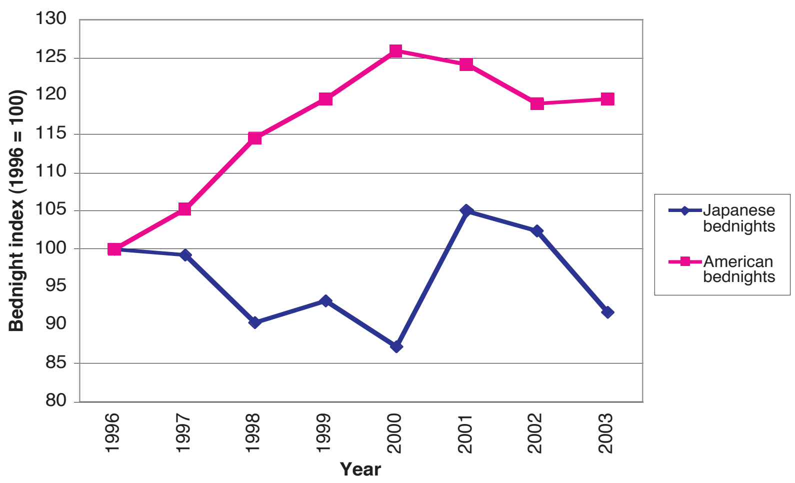
Figure 7 European, domestic and total foreign bednights



Source: TourMIS

When specific markets are analyzed, the effect of different events can be clearly seen. Figure 8 shows that the American market grew consistently until 2001, when arrivals were affected by September 11. The Japanese market, on the other hand, shows the impact of the economic problems Japan has suffered since the late nineties, with bednights declining between 1996 and 2000. A recovery in 2001 was cut short by the impact of September 11, with further declines being noted in 2002 and 2003.

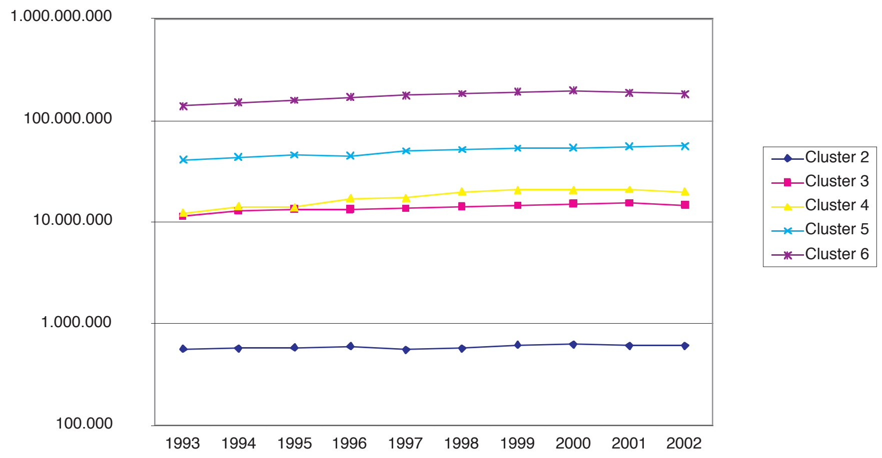
Figure 8 Japanese and American bednights



Source: TourMIS

When the cities in the TourMIS database are related to the clusters identified in chapter 2 (see Table 1, page 7), it can be seen that different patterns of tourism demand emerge. Clearly the major cities in clusters 5 and 6 attract far more tourists than those in the other clusters. Cluster 2 cities in particular have relatively low volumes of city tourism.

Figure 9 Absolute bednights by cluster type

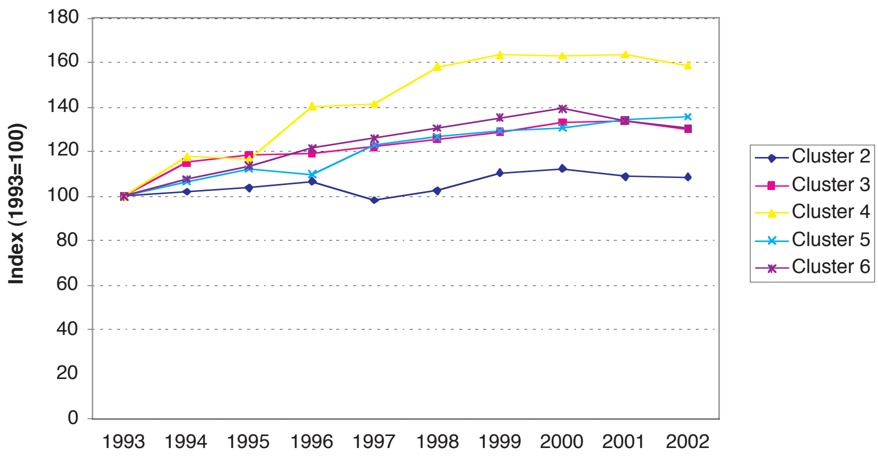


Cluster 2: Würzburg
Cluster 3: Basel, Florence, Gent, Ljubljana, Oslo, Tallin, Venice
Cluster 4: Hamburg, Helsinki, Prague, Salzburg, Seville
Cluster 5: Amsterdam, Barcelona, Brussels, Budapest, Copenhagen, Lisbon, Milan, Munich, Vienna
Cluster 6: Berlin, London, Madrid, Paris, Rome

Source: TourMIS

Looking at the trends over the past decade, it seems that cluster 6 cities (London and Paris) enjoyed the most consistent growth up to the year 2000 (see Figure 10). Beyond this point, however, divergence is evident, as the larger cities have experienced lower growth rates, while cities in clusters 2, 3 and 4 have not declined so steeply. However, it is difficult to evaluate the extent to which these patterns are due to the cultural content of the city product or to other factors, such as economic growth, prices or security fears in large cities.

Figure 10 Bednights by cluster type (index)



Source: TourMIS

One of the ways in which the TourMIS data can reveal something about the impact of culture on city trips is by examining the effect of major cultural events. The European Cultural Capital events in particular have tended to stimulate large tourist flows to some cities. A complete list of Cultural Capitals is included in appendix 7.

Table 2 Change in bednights all visitors to a selection of Cultural Capitals (CC) in the period 1995 to 2003

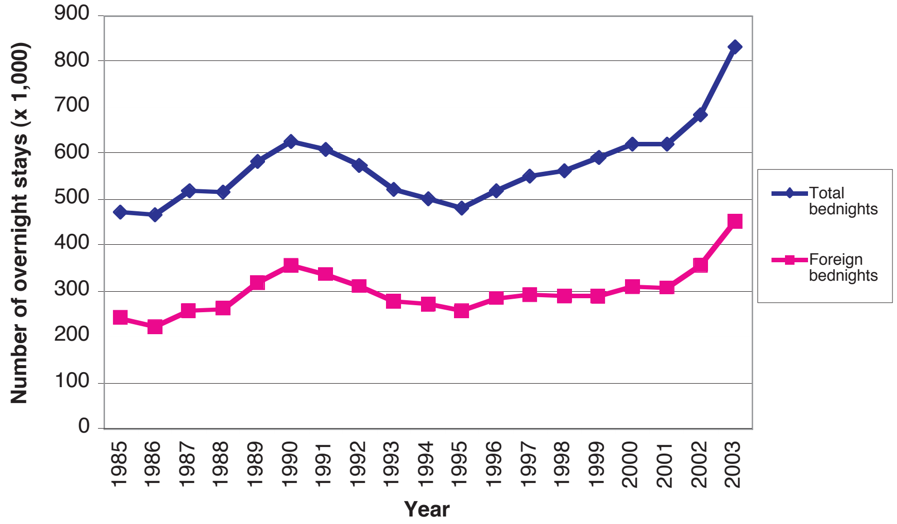
Cultural capital	% Change in visitor stays in CC year	% Change in visitor stays CC +1
Luxembourg - 1995	-4.9	-4.3
Copenhagen - 1996	11.3	-1.6
Thessaloniki - 1997	15.3	-5.9
Stockholm - 1998	9.4	-0.2
Weimar - 1999	56.3	-21.9
Helsinki - 2000	7.5	-1.8
Prague - 2000	-6.7	5.6
Reykjavik - 2000	15.3	-2.6
Bologna - 2000	10.1	5.3
Brussels - 2000	5.3	-1.7
Bergen - 2000	1.0	1.2
Rotterdam - 2001	10.6	-9.6
Salamanca - 2002	21.6	n.a.
Bruges - 2002	9.0	n.a.
Graz - 2003	24.8	n.a.
Average	**12.4**	**-3.9**

Note: 'n.a' is not available. For Cultural Capitals not mentioned in this list, no data was available
Source: TourMIS and city tourist offices

Table 2 shows that Cultural Capital host cities have increased bednight volumes by up to 50% during the Cultural Capital year. The biggest increases have generally been in smaller heritage cities (clusters 2 and 3) such as Weimar and Graz, with good results also evident in some larger cities striving to develop a cultural image, such as Glasgow (cluster 4). In contrast, metropolises such as Brussels (cluster 5) have generally achieved lower growth in percentage terms.

Looking at the longer term, it can be seen that the Cultural Capital event often boosts tourism considerably above the underlying trend. For example, in Graz in 2003, the 25% increase in total bednights was the largest single increase recorded in the last 20 years. The increase in foreign tourist numbers was particularly marked due to the European profile of the event.

Figure 11 Number of bednigths in Graz



Source: TourMIS

Different patterns emerge in other cities. Appendix 8 shows the trends in bednights for Bologna (cultural capital in 2000), Brussels (2000), Glasgow (1990), Helsinki (2000), Lisbon (1994) and Weimar (1999). These data indicate that the event had a positive effect on visitor numbers in most cities, but some cities have been more successful in attracting visitors than others. For example visitor growth in the Cultural Capital year was particularly significant in Glasgow and Weimar. For the Cultural Capitals of 2000, however, the impact was far less marked, probably because of the effect of nine different cities sharing the title, and other competing events around the Millennium Year. In the case of Lisbon the Cultural Capital year (1994) was not as successful as the EXPO 98 event, which also featured considerable urban redevelopment initiatives.

What is clear in almost all cases, however, is that the effect of the Cultural Capital year has been relatively short-lived. Most cities were unable to hold on to the visitor gains as other cities took over the title of Cultural Capital. This corroborates research among Dutch tour operators, which indicates that they tend to focus special programmes on the Cultural Capital, but move with the title in the following year (Richards 2001).

2.3 IPK International

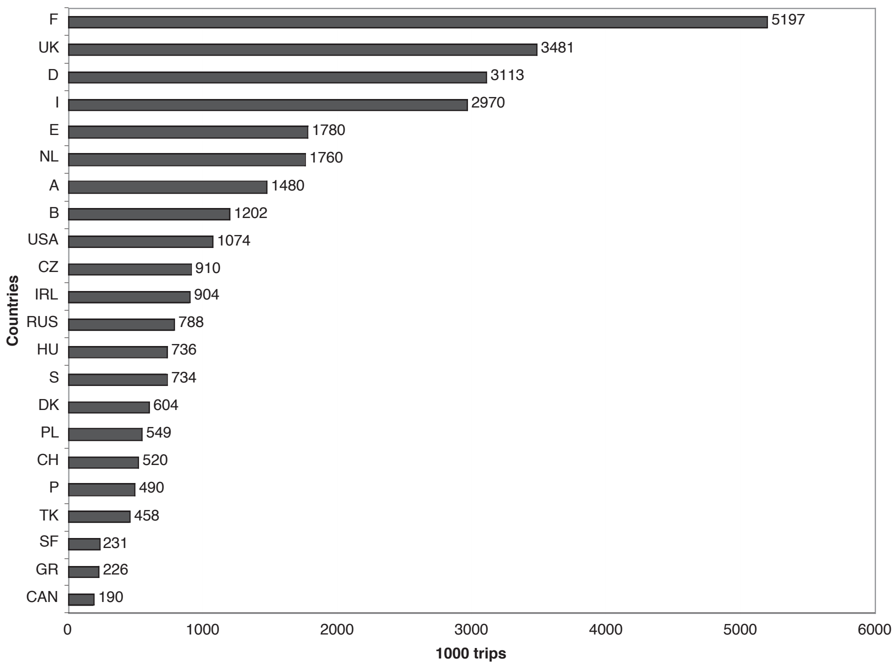
The IPK International data are derived from the “European Travel Monitor”. This is a continuous survey measuring the outbound travel demand and travel behaviour of the Europeans. The surveys cover all Western and Eastern European countries, monitoring the volume and the most important characteristics of all outbound trips through a standard questionnaire. Based on surveys representative of the population, over 400,000 Europeans are interviewed in more than 30 European countries every year. The data used in this report are derived from a special evaluation of the European Travel Monitor 2002 undertaken by IPK International on behalf of the European Travel Commission. A list of city holiday trips, destinations and origin countries is included in appendix 10. The data cover European outbound city holiday trips, and thus exclude business and VFR travel[2]. The definition used for a city trip was a ‘stay in a city only’ so touring holidays including a city visit are not included. IPK International supplied matrices of the origin and destination flows of city trips, as well as activities undertaken in the destination. Analysis of these data is therefore limited to the tables supplied, which relate to 2002.

2.4 IPK International Data Analysis

Outbound city holiday trips

An analysis of the outbound city holiday trips covered by the IPK International data (see Figure 12 and Figure 13, pages 15 and 16) indicates the domination of a few large countries in both the generation and reception of city tourism in 2002. France is the most popular destination overall, followed by the UK and Germany. British and German tourists also account for a large share of all outbound city tourism flows. The table also indicates that the USA is the most important destination for Europeans travelling outside Europe, a trend no doubt stimulated by relatively cheap flights across the Atlantic in recent years. There is little doubt that the main destination and origin countries are those with the largest populations and therefore also the largest urban destinations.

Figure 12 Outbound city holiday trips, main destinations (2002)

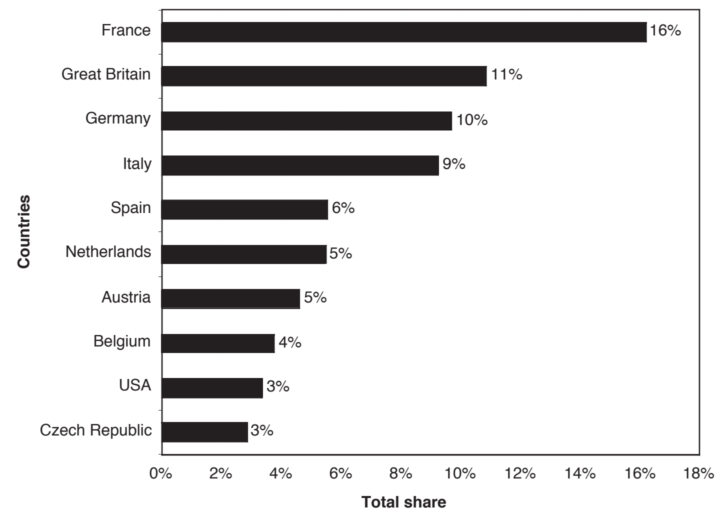


F=France, UK=United Kingdom, D= Germany, I=Italy, E= Spain, NL=Netherlands, A=Austria, B= Belgium, USA = United States of America, CZ= Czech Republic, IRL=Ireland, RUS=Russia, HU=Hungary, S=Sweden, DK=Denmark, PL=Poland, CH=Switzerland, P=Portugal, TK=Turkey, SF=Finland, GR=Greece and CAN=Canada.

Source: IPK International

Not surprisingly, the IPK data also show that there is a tendency for city holiday trips to be dominated by neighbouring countries of origin. For example, city trips to France mainly originate from the UK, Germany and Spain, while more than half of city trips to Italy come from Germany (see appendix 9 and appendix 10). The major exception to this is Spain, where the major markets for city tourism are the UK and Germany, just as for tourism flows as a whole.

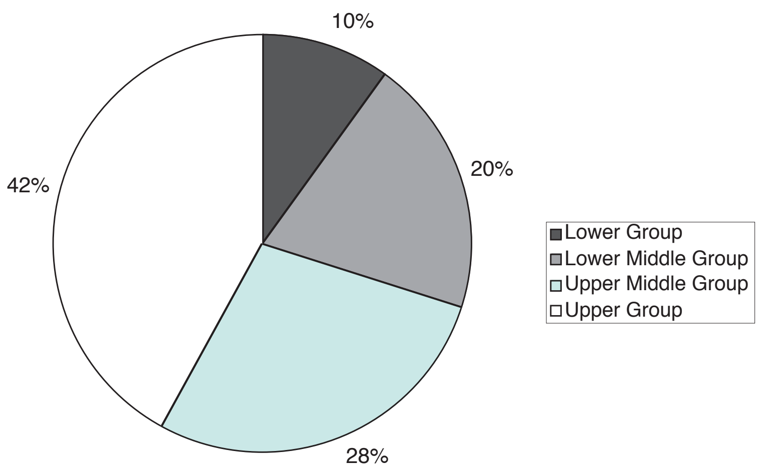
Figure 13 Outbound city holiday trips, main countries of origin (2002)



Source: IPK International

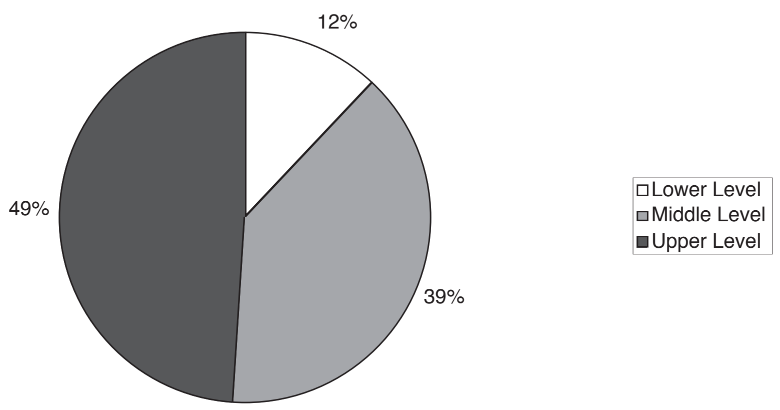
The IPK data also indicate a strong relationship between income groups and city tourism. Those in the top income groups are four times as likely to make a city trip as those in the lowest income group (see Figure 14). Not surprisingly, those countries with higher levels of GDP tend to contribute the largest share of high-income city tourists. Education levels are also very strongly correlated with city trips, with those in the highest education group making four times as many city trips as those in the lowest group (see Figure 15, next page).

Figure 14 Outbound city holiday trips by income group (2002)



Source: IPK International

Figure 15 Outbound city holiday trips by educational level (2002)



Source: IPK International

Outbound city holiday trips related to population size

If the number of outbound city holiday trips is calculated in terms of trips per 1,000 inhabitants (see appendix 11), it is clear that the smaller, richer countries in North-Western Europe make the largest relative contribution to the market. This is partly a result of high living standards, and partly due to the ease of travelling internationally. The leading position of Ireland may be slightly misleading, as the majority of all city trips are taken to the UK. Countries with larger populations, such as Germany and the UK have lower levels of trip taking per head, but generate much larger overall volumes of city trips. Those countries with relatively low levels of trip-taking tend to be the new EU members, or those still outside the EU, such as Turkey and Russia.

Activities by origin

The activities undertaken by the city visitors during their trips were also monitored by the IPK International study (see appendix 12). These data show that the most popular activities overall are sightseeing and visiting objects of interest (for example monuments), followed by sauntering and enjoying the atmosphere, eating and drinking and shopping. The most important traditional cultural activity is visiting museums (41% of respondents), which reflects the patterns found in the ATLAS surveys (see paragraph 2.6, page 18). In general, the data follow the same pattern by country of origin, although there are some differences which seem to relate to differing interpretation of cultural activities. For example, eating and drinking are not seen as separate activities during the trip by the Greeks or the Portuguese even though this is the third most important activity for overall respondents. These data seem to indicate that traditional 'high' culture (such as museums and monuments) does not play a leading role in the activities of city visitors, even though it may be an important motivation for the trip. It is also clear that visits to events, such as arts performances and festivals are fairly unimportant in the activity mix. Again, this reflects the picture developed from the ATLAS surveys, where the conclusion was drawn that the timing of events, the difficulty in obtaining tickets and language barriers were the basic causes.

Theatre visits, museum visits and sightseeing

There are very few clear patterns in terms of the cultural activities in the destination by country of origin (see appendix 13). Only the Austrians consistently occupy first place in terms of visits to museums, theatres and sightseeing and monuments. In other countries, high levels of sightseeing do not necessarily match high levels of visits to museums and theatres. For example, Spanish respondents had a very low level of sightseeing activity, but the third highest level of museum visits. Russians paid few visits to museums or theatres, but had reasonably high levels of sightseeing. Some of the differences in responses may be due to different perceptions of cultural attractions by nationality.

In general, however, the IPK data show that sightseeing is the most important 'cultural' activity for city visitors. This is not surprising given the relative accessibility of this activity. For attractions, such as museums which generally charge admission, visitation levels are lower, but still average around 40% for European city visitors as a whole. Attendance at theatres during city trips is much lower, because of the problems associated with obtaining tickets and language barriers.

2.5 The ATLAS Cultural Tourism Research Programme

The European Association for Tourism and Leisure Education (ATLAS) is an international association of higher education and other organizations, which aims to develop transnational education and research in the tourism and leisure subject areas. ATLAS has some 300 members across 70 countries worldwide, but a large proportion of total membership is concentrated in Europe. The "Cultural Tourism Research Programme" was launched in 1991, with the support of the European Commission.

Four rounds of survey research at cultural attractions across Europe, including the EU and the Accession Countries, were carried out between 1992 and 2001.[3] A fifth round of research was conducted in 2004. In total, almost 30,000 visitor surveys have been collected from over 200 sites, most of which are located in cities. The ATLAS data reported here includes samples, which contain local residents, domestic tourists and international tourists visiting European cities (nevertheless the focus of the analysis is on the international tourist).

2.6 ATLAS Data Analysis

Each of the data collection periods has yielded at least 5,000 completed visitor interviews, the vast majority of which came from urban locations. The proportion of local residents, domestic tourists and foreign visitors has varied between survey periods, largely as a result of different survey locations being used. In 1992, for example, the surveys concentrated on capital cities, whereas subsequent surveys have attempted to cover a wider variety of locations and attraction types.

Table 3 ATLAS survey respondents by year

Year	Total response	Response from cities	Foreign tourists	Domestic & local residents
1992	6,400	5,088	56%	44%
1997	8,300	4,993	29%	71%
1999	6,730	5,100	36%	64%
2001	5,320	4,160	32%	68%

Source: ATLAS

Of the foreign tourists covered by the survey in 2001, 69% of respondents came from European countries of origin and 31% from outside Europe. Within the group of tourists from outside Europe, the Americans were the best represented (15% of foreign tourists) and therefore separate analyses have been made for this group where possible.

Gender

The profile of respondents over the past decade shows a relative degree of consistency in the gender distribution of cultural visitors in cities. There was a slight preponderance of females in the surveys held between 1997 and 1999. The 2001 surveys indicate a slight rise in the proportion of female visitors, although it is too early to ascertain if this represents a real trend. The higher proportion of female visitors is in line with surveys of cultural consumption in general. In most cases there are few differences between men and women as regards cultural tourism behaviour. However, some significant differences were recorded in terms of motivation, with women more likely to be attracted by the 'atmosphere' of a city, and in terms of satisfaction levels, which were higher for women.

Table 4 Gender of respondents in cities in Western Europe (in percentage)

	Foreign tourists (including American tourists)				American tourists (n=277)	Domestic & local tourists	All respondents
	2001	1999	1997	1992	2001	2001	2001
Male	43	49	48	48	44	41	42
Female	57	51	52	52	56	59	57

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: ATLAS

Education

The profile of cultural visitors in all the ATLAS surveys conducted since 1992 indicates a relatively high level of education. In 1999, for example, it was estimated that the proportion of cultural visitors with a higher education qualification was about 25% higher than the EU average. A comparison of the 1992 and 2001 surveys also indicates that education levels have risen among cultural visitors, in line with increased levels of higher education participation in the population as a whole. As the table below shows, foreign tourists have a higher level of education compared with domestic tourists and local residents.

Table 5 Highest educational qualification of respondents in cities in Western Europe (in percentage)

	Foreign tourists (including American tourists)		American tourists (n=277)	Domestic & local tourists	All respondents
	2001	1992	2001	2001	2001
Primary school	1	0	0	2	1
Secondary school	13	17	3	24	20
Further education	14	27	9	25	21
First degree	45	31	46	30	35
Postgraduate	28	24	42	19	24

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: ATLAS

Age

Cultural tourists have generally been viewed as relatively older tourists, as levels of interest in 'culture' are assumed to increase with age. The IPK International data and numerous other surveys have, however, tended to indicate that in fact young people make up a large proportion of visitors to cities, and therefore also tend to visit cultural attractions in those cities relatively frequently. The age profile from the ATLAS surveys shows an increase in the proportion of older people visiting cultural attractions in recent years. This trend is consistent with the ageing population of Europe. American tourists in particular tend to have an older age profile, with the largest group being between 50 and 59 years of age.

The age profile of visitors to specific attractions will however vary quite widely. In general, 'heritage' attractions will tend to attract older visitors, whereas 'popular' cultural attractions will tend to have a younger audience profile.

Table 6 Age of respondents in cities in Western Europe (in percentage)

	Foreign tourists (including American tourists)				American tourists (n=277)	Domestic & local tourists	All respondents
	2001	1999	1997	1992	2001	2001	2001
15 or younger	0	1	1	3	0	0	0
16-19	5	6	4	7	4	6	5
20-29	27	22	25	32	21	21	24
30-39	20	22	18	19	15	20	19
40-49	22	19	20	17	22	20	20
50-59	16	17	18	13	24	15	16
Over 60	10	13	14	9	14	19	15

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: ATLAS

Employment

The employment profile of cultural visitors has remained relatively stable over the past decade. Employees make up the largest group, with 44-48% of respondents. Retired people and students also account for about 15% each of the total visitors. The proportion of unemployed visitors has declined steadily over the survey period. In terms of employment status, those in the professional and managerial functions make up around two-thirds of the total audience. American city visitors tend to have an even higher employment status, with 72% drawn from professional or managerial occupations. This is a logical consequence of the high educational profile of cultural visitors.

A high proportion of cultural visitors also have an occupation that is connected with culture. There is no immediate explanation for the drop in proportion recorded in the 2001 surveys, but the self-reported proportions of those connected to the cultural sector (those who consider their work to have a relationship with culture) are far larger than the proportion of cultural employment in the EU (less than 4% in most countries). This indicates that consumers actually have a wider view of the 'cultural sector' than the relatively narrow statistical definitions.

Table 7 Normal occupation connected with culture of respondents in cities in Western Europe (in percentage)

	Foreign tourists				Domestic & local tourists	All respondents
	2001	1999	1997	1992	2001	2001
Connected	26	35	-	20	23	24
Not connected	74	65	-	80	77	76

Source: ATLAS

Foreign tourists tend to have occupations, which are more often connected with culture, and this trend is particularly noticeable for Americans (28% with a cultural occupation).

Income

As a result of the largely managerial/professional composition of the cultural visitors, income levels also tend to be relatively high. The ATLAS data have consistently shown average income levels about one third higher than those for EU citizens in general. This is in part due to the higher incomes of many non-EU visitors, particularly from the USA. There was a large rise in average income in 2001 due to the large sample of US visitors, over 60% of whom fall in the 50,000 euro plus income category.

Previous visit

Over half the visitors sampled between 1997 and 2001 had not previously visited the attraction at which they were interviewed. Not surprisingly, this proportion was much higher among international tourists and especially among tourists from outside Europe.

The number of previous visits increased significantly with age, underlining the importance of attracting young visitors who may subsequently return later in life.

Table 8 Previous visit to attraction household of respondents in cities in Western Europe (in percentage)

	Foreign tourists				Domestic & local tourists	All respondents
	2001	1999	1997	1992	2001	2001
Previous visit	13	44	37	26	51	36
No previous visit	87	56	63	74	49	64

Source: ATLAS

Holiday motivations

Respondents were asked to indicate the type of holidays they usually took, as well as specific type of holiday engaged in at the time of interview.

Table 9 Usual holiday type of respondents in cities in Western Europe (in percentage)

	Foreign tourists (including American tourists)			American tourists (n=277)	All respondents
	2001	1999	1997	2001	2001
Sun/beach	27	26	17	25	26
Touring holiday	24	14	18	32	18
Cultural holiday	19	20	20	18	20
City break	14	15	15	8	16
Countryside recreation	8	10	13	8	9
Winter sports	4	5	6	4	4
Mountain recreation	3	5	6	4	4
Health/sport orientated	2	4	4	2	3

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: ATLAS

In terms of usual holiday types, sun/beach holidays were not surprisingly the single most important category. This also matches data from the European Travel Monitor over recent years. Cultural holidays have consistently accounted for about 20% of respondents, and city breaks account for a further 16%. This would indicate that city trips and cultural holidays together account for over a third of the total tourist market.

The types of holidays normally taken vary according to a number of factors, most notably tourist origin. American respondents, for example, were much more likely to undertake touring holidays, and slightly less likely to characterize their 'usual' holidays as 'cultural'. This may indicate that the cultural content of a trip is often perceived as being less important than the form of travel.

In terms of the type of holiday undertaken by interviewees at the time of their visit to the cultural attraction, not surprisingly city breaks tended to be more important, accounting for over a third of responses in 2001. The proportion of cultural holidays is about the same as that for the usual type of holiday. This indicates that even when engaging in cultural visits on holiday, tourists in general are not likely to perceive their whole trip as being 'cultural' in terms of motivation. This underlines the fact that cultural attractions are consumed by the majority of visitors as a secondary element of their holiday, rather than being the prime motivation.

Table 10 Type of current holiday respondents in cities in Western Europe (in percentage)

	Foreign tourists (including American tourists)			American tourists (n=277)	Domestic tourists	All respondents
	2001	1999	1997	2001	2001	2001
Touring holiday	51	19	25	69	11	31
City break	32	30	17	16	49	37
Cultural holiday	13	35	22	10	25	19
Sun/beach	1	7	12	2	2	2
Countryside recreation	1	4	11	1	6	4
Health/sport orientated	1	2	2	1	1	1
Mountain recreation	0	1	2	0	0	0
Winter sports	0	1	2	0	0	0
Other	0	0	1	2	7	6

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: ATLAS

An analysis of the correlations between different types of holidays indicates a strong relationship between cultural trips to cities and touring holidays and sun/beach holidays. In terms of the usual holidays taken, 34% of those taking cultural holidays usually take sun/beach holidays as well, and a further 32% also take touring holidays. People who combine different types of holidays are those who take most holidays: ‘cultural tourists’ at one holiday can be ‘sun/beach’ tourists at other times of year.

Motivation for visiting cultural attractions

In terms of motivation for visiting cultural attractions, responses over the years have tended to be relatively stable. The most important reasons for all visitors tend to be learning about history and culture and enjoying the atmosphere of a place. There are relatively few differences between visitor groups, but older visitors do tend to be more motivated to learn about local history and culture than younger visitors. Those in the 30-49 age group are more motivated by entertainment.

Attractions visited

In terms of the attractions visited by tourists in cities, the ATLAS surveys indicate that museums were by far the most popular, attracting over half the visitors surveyed. In general terms, foreign tourists visited more attractions than domestic tourists, probably because of their eagerness to cram as many experiences as possible into their visit. The major exception to this was festivals, which are more often attended by domestic tourists and local residents, probably because of the information and booking problems posed for foreign visitors. It is notable, however, that American tourists attend a large number of arts events, particularly in the UK.

Table 11 Attractions visited in cities by visitor origin in 2001 (in percentage)

	Foreign tourists (including American tourists)	American tourists (n=277)	Domestic & local tourists	All respondents
Museums	64	68	46	51
Art galleries	40	41	28	31
Historic houses	40	44	25	27
Monuments	37	41	20	24
Performing arts	27	31	22	25
Heritage centres	24	22	15	17
Festivals	14	9	18	19

Note: Multiple answers
Source: ATLAS

Information sources used prior to visit

The main information source utilized by cultural visitors in 2001 was friends and family, which accounted for almost a third of all respondents. The Internet was the second most important information source, with almost 19% of respondents indicating they had searched the Internet for destination information. The Internet already outstrips guidebooks for cultural visitors to cities in terms of trip planning. Americans tend to rely heavily on family and friends and guidebooks, and also made a high level of use of the Internet in 2001.

Table 12 Information sources used by respondents in cities in Western Europe in 2001 (in percentage)

	Foreign tourists (including American tourists)	American tourists (n=277)	All respondents
Family, friends	29	26	31
Guide books	23	27	17
Internet	19	21	19
Previous visit	12	8	13
Tourist Board	9	9	10
Tour operator brochure	3	7	5
TV/radio	1	1	1
Newspaper, magazine	1	1	4

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: ATLAS

Booking

In terms of actually booking travel, the Internet still remains relatively unimportant, as the largest group of visitors still tend to book travel and/or accommodation directly via telephone or fax. Interestingly, Internet use varies little with age, but there is a clear tendency for older visitors to book in advance more frequently and to make more use of packages. American visitors are more likely to book all-inclusive packages than other foreign tourists. The tendency for older tourists to book packages more frequently may indicate a desire for security.

Table 13 Booking arrangements of foreign tourists in cities in Western Europe in 2001
(in percentage)

	Foreign tourists (including American tourists)			American tourists (n = 277)
	Under 30	30-49	50 and over	
Own arrangements	40	39	35	38
All-inclusive package (via travel agent/tour operator)	21	30	30	34
Transport only (via travel agent/tour operator)	20	19	21	16
Booked via Internet	13	7	10	10
No advance booking	6	3	2	1
Accommodation only (via travel agent/tour operator)	1	2	1	1

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: ATLAS

Transport to the attraction

Visitors were also asked what means of transport they had used to get to the attraction. Not surprisingly, domestic tourists tended to use their own cars, whereas foreign tourists used public transport, or walked to the attraction. Coaches were relatively unimportant for the ATLAS sample, although more domestic visitors came by coach than foreign tourists. This may reflect the relatively low level of package tourists in the total sample. The differences between domestic and foreign tourists are largely caused by foreign tourists tending to stay in the city where the attraction is located, whereas domestic visitors will be travelling from further afield.

Table 14 Transport used to get to the attraction by tourists in 2001 (in percentage)

	Foreign tourists	Domestic tourists	All respondents
Walking	36	6	26
Local transport	34	6	24
Own car	8	51	25
Air	7	3	5
Rental car	6	3	5
Train	5	27	10
Coach	4	8	5
Cycle	0	1	0

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: ATLAS

Time of decision

The timing of the decision to visit a particular cultural attraction is of great interest for marketing purposes, since it indicates the times and locations in which the potential consumer can be reached. The majority of cultural visitors decide to visit before leaving home, which shows the importance of marketing in source countries or regions. However, over a third of visitors are still undecided when arriving in the destination. The proportion is even higher for those in the younger age groups, and particularly for those in the age groups with young children. Those deciding to visit an attraction before leaving home were significantly more likely to be older, retired and less well educated tourists and those with higher incomes. The further people travelled and specifically to the destination, the more likely they were to consult information prior to departure. The data indicate that increasing uncertainty, stemming from lack of knowledge of the destination, getting older or being less well educated tended to stimulate the use of information sources at home. Younger, more highly educated tourists were more likely to wait until they arrived in the destination to decide which attractions they were going to visit. For example about 40% of respondents under the age of 30 made their decision to visit a cultural attraction before leaving home, compared to 66% of those over the age of 60.

Table 15 Time of decision of respondents in cities in Western Europe in 2001 (in percentage)

	Foreign tourists			All respondents		
	Under 30	30-49	50 and over	Under 30	30-49	50 and over
Before leaving home	48	45	54	53	48	62
During the trip here	5	7	5	9	11	9
When I arrived in the area	47	48	41	37	41	29

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: ATLAS

The vast majority of local residents decide which attractions they will visit before arriving in the destination. For foreign visitors, however, there is a division between those deciding before departure, and those deciding to visit sites once they arrive in the destination.

Table 16 Time of decision of respondents in cities in Western Europe in 2001 by origin
(in percentage)

	Foreign tourists	Domestic tourists	Local residents	All respondents
Before leaving home	48	53	76	54
During the trip here	6	16	5	10
When I arrived in the area	46	32	19	36

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: ATLAS

Accommodation

Hotels were the most frequently used form of accommodation. Visiting friends and relatives, youth hostels and self-catering were particularly important forms of accomodation for younger visitors, underlining their more limited daily spends.

Table 17 Type of accommodation of respondents in cities in Western Europe in 2001
(in percentage)

	All respondents			Foreign tourists	Domestic & local tourists	All respondents
	Under 30	30-49	50 and over			
Hotel	26	42	42	46	38	42
Bed and breakfast / private room	14	13	11	15	13	13
Family and friends	20	18	13	14	26	20
Youth hostel	13	2	1	9	2	7
Own home	19	20	28	7	17	12
Self-catering	8	4	3	7	4	5
Tent/caravan	1	1	1	2	1	1

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: ATLAS

2.7 EUROBAROMETER

The EUROBAROMETER surveys form part of a regular monitoring of the EU population carried out through a household survey in each country. The survey used in this report was carried out in the final quarter of 1997, with a sample of 8,700 people and it was the last time questions about holidays were asked. This enables an analysis of the frequency of city breaks among the EU population as a whole, and about cultural activities undertaken on city trips. The analysis produced here refers mainly to city trips only (1st holiday n=2,101), although the survey covered all types of trips taken. The EUROBAROMETER survey covered both domestic and foreign holiday trips.

Comparisons between individual surveys are often made difficult by variations in the wording of questions and by the categories employed for analysis. This is clear in the case of age groups, which differ between the ATLAS survey and the EUROBAROMETER data. In general terms, however, both surveys seem to indicate a high proportion of younger people among city visitors. The ATLAS surveys indicate that almost 30% of respondents were under 30 in 1997, while the EUROBAROMETER data indicate that about 42% were under 35.

2.8 EUROBAROMETER Data Analysis

2.8.1 Visitor Profile

This part of the EUROBAROMETER data analysis covers the profile of all respondents and the importance of culture in their holidays.

Visit to attractions and to events

Historic towns and monuments also feature as the most important attractions visited on holiday, closely followed by museums and exhibitions. This underlines the fact that even when culture is not the primary motivator for travel, visits to cultural attractions are still an important part of the holiday experience. Traditional local events tend to be more important than arts performances, sports or religious events. This is probably related to the accessibility of the different forms of events.

Table 18 Visits to attractions and events of respondents (1997)

Visit to attractions	%	Visit to events	%
Towns/monuments	70	Traditional local events	64
Museums/exhibitions	63	Concerts	55
Nature reserves	50	Sports events	26
Churches/temples	49	Religious events	25
Theme parks	26		
Health centres	11		
Industrial sites	4		

Note: Multiple answers
Source: EUROBAROMETER

Motivation by nationality

The table below shows the motivations of the respondents for holidays in general. In this table no distinction is made between domestic and foreign holidays. From further analysis of the data it also appears that:

- female respondents were slightly more likely to be motivated to visit by history or culture than males;
- cultural and historical motivations also tended to increase with age;
- those with higher incomes were significantly more likely to be motivated by history or culture than those on low or medium incomes.

Table 19 Motivation by nationality of respondents (1997) (in percentage)

	Total	B	DK	D	GR	E	F	IRL	I	LU	NL	P	UK	A	S	SF
Scenery/nature	46	53	46	66	33	41	52	3	49	45	65	39	30	49	45	37
Climate	45	52	43	51	27	42	50	41	39	56	45	43	42	52	53	31
Cost of travel	36	40	34	48	38	31	34	32	33	38	22	22	32	40	43	40
History/culture	32	28	50	38	27	28	23	18	35	25	39	18	26	33	40	23
Accommodation	30	26	26	51	31	18	29	21	25	25	36	13	37	31	28	26
Environment	26	21	18	38	40	18	34	12	38	24	12	24	22	28	23	29
Complete change	24	30	16	20	26	15	35	30	9	15	40	22	31	27	26	20
Food and drink	24	23	21	39	12	9	15	21	17	34	23	10	30	28	35	18
Cost of living	21	16	17	27	42	10	16	17	16	14	30	19	17	14	28	21
Safety	19	16	20	33	11	7	12	8	16	24	17	15	23	20	26	19
Meet people	19	16	25	18	17	15	14	15	25	9	19	17	20	25	18	19
VFR[4]	18	10	15	13	31	27	26	25	13	7	7	34	12	18	22	18
Entertainment	18	17	9	16	40	17	14	22	28	18	12	15	21	15	20	12
Easy to get there	13	11	8	20	19	8	9	18	13	9	8	9	20	16	10	11
Sport	13	19	11	16	12	10	16	6	12	17	11	7	9	21	14	12
Childrens activities	13	9	21	10	10	6	12	15	8	9	21	5	18	13	13	13
Knowing language	11	13	12	11	6	6	9	8	8	20	15	8	8	12	17	11
Close to home	5	6	3	7	7	8	3	3	7	3	10	3	3	13	1	2

B= Belgium, DK=Denmark, D= Germany, GR=Greece, E=Spain, F=France, IRL=Ireland, I=Italy, LU=Luxemburg, NL=Netherlands, P=Portugal, UK=United Kingdom, A=Austria, S=Sweden and SF=Finland.

Note: Multiple answers
Source: EUROBAROMETER

In terms of the motivations for travel, history and culture are seen as less important than elements of the natural environment, such as scenery and climate. History and culture seem to be particularly important motivators for the Danes, the Swedish and the Dutch in their general travel consumption, and in the case of the Danes culture seems to be more important than natural factors.

Table 20 Visits to attractions during holidays of respondents (1997) (in percentage)

	Total	B	DK	D	GR	E	F	IRL	I	LU	NL	P	UK	A	S	SF
Towns/ monuments	58	57	71	67	46	56	67	52	54	52	64	34	63	52	62	45
Museums/ exhibitions	49	46	64	48	53	36	52	37	51	46	55	31	48	49	58	39
Nature reserves	48	39	57	51	37	44	53	38	45	55	58	40	55	47	46	35
Churches/temples	39	30	48	45	45	27	36	25	40	38	51	31	35	40	40	33
Theme parks	27	26	16	36	10	23	26	27	29	37	32	12	35	28	34	16
Health centres	10	5	11	16	5	6	6	6	11	11	4	10	6	14	6	25
Industrial sites	3	2	3	4	1	1	2	2	1	7	3	2	3	0	3	3

B= Belgium, DK=Denmark, D= Germany, GR=Greece, E=Spain, F=France, IRL=Ireland, I=Italy, LU=Luxembourg, NL=Netherlands, P=Portugal, UK=United Kingdom, A=Austria, S=Sweden and SF=Finland.

Source: EUROBAROMETER

In terms of the visits made during all trips, visits to towns and monuments are the most important category, followed by museums. This general pattern seems to mirror the results of the IPK and ATLAS surveys. Those most likely to make visits to such attractions are the Danish, French, Germans and Dutch.

Table 20 shows that both in terms of cultural motivations and visits, Denmark, Germany, the Netherlands and Sweden have the strongest link with culture. This may be connected to a greater interest in culture (or at least cultural heritage) in these countries, but it may also be related to the relative density of historic towns and monuments they have.

Culture/history motivation by destination

In general terms, those Western European countries with highly developed beach or rural tourism products tended to attract less cultural or historically motivated tourists. It is notable that Italy and Greece score much higher than competing Mediterranean destinations in terms of this factor. Because of their rich history reaching back into antiquity these countries are able to offer a more comprehensive range of cultural products than many of their competitors.

Table 21 Culture/heritage motivation for visiting a specific country in 1997

Western Europe	%	Central / Eastern Europe	%
Denmark	46	Lithuania	75
Germany	40	Latvia	66
Switzerland	39	Czech Republic	57
Italy	38	Slovenia	40
Austria	35	Poland	38
Luxembourg	35	Bulgaria	29
Switzerland	34	Hungary	27
United Kingdom	33		
France	33		
Greece	32		
Netherlands	31		
Belgium	27		
Spain	25		
Sweden/Finland	25		
Ireland	21		
Portugal	20		

Note: Multiple answers
Source: EUROBAROMETER

In Central and Eastern Europe, the smaller countries tend to be visited primarily for cultural reasons, whereas those with more diversified products also tend to attract rural tourism and beach tourism. Again, Denmark and Germany feature strongly as destinations with a high level of cultural motivation, probably because of the relative concentration of city destinations. In contrast, destinations such as Italy, the United Kingdom and Spain score lower in terms of cultural heritage motivations, perhaps pointing to the more diverse tourism markets in these countries. It is notable that in Central and Eastern Europe relatively small countries such as Lithuania are dominated by cultural heritage tourism, whereas larger countries such as Hungary again feature cultural heritage as just one element of a broader motivational mix.

2.8.2 Visitor Profiles-City Holidays Only

This part of the EUROBAROMETER data analysis deals with city holidays only.

Age

Visitors to cities are drawn heavily from younger age groups, with those under 35 accounting for almost 42% of all visitors.

Table 22 Age group of the respondents who made a city trip (1997)

Age	%
15-24 years	20
25-34 years	22
35-44 years	17
45-54 years	17
55-64 years	14
65 year or older	11

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: EUROBAROMETER

Education

City visitors tend to be relatively highly educated, almost 25% having completed their education at over 22 years of age, or equivalent to a university education. The high proportion of respondents still studying (16%) also underlines the importance of students in the city tourism market.

Transport, accommodation and travel arrangements

The most popular form of transport used on city trips is the private car, as is the case with holiday trips in Europe in general. City trips are distinguished, however, by the heavy use of scheduled flights. It is likely that the share of scheduled flights has also increased in recent years, owing to the growth of budget airlines.

The most popular form of accommodation is not surprisingly the hotel, although staying with friends and relatives also accounts for over a third of all accommodation use.

Table 23 Transport, accommodation and travel arrangement of the respondents who made a city trip (1997)

Transport	%	Accommodation	%	Travel arrangement	%
Own car	34	Hotel	47	Self	75
Scheduled flight	25	Family	22	Family member	34
Charter flight	18	Friends	13	Travel agent whole trip	13
Train	12	Rented	12	Travel agent accommodation	11
Coach	11	Camping	9		
Boat	9	Youth hostel	3		
Scheduled bus	5	Holiday home	3		
Hire car	2				

Note: Due to discrepancies in rounding off, columns may not add up to 100%
Source: EUROBAROMETER

Motivations

The importance of history and culture as motivators for city tourism in Europe is underlined by the fact that this is identified as the most important single factor in stimulating travel. This is seen as more important than climate in terms of all trips taken.

Table 24 Motivations of the respondents who made a city trip (1997)

Motivation	%	Motivation	%
History/culture	46	Cost of living	21
Climate	41	Environment	21
Scenery/nature	41	Safety	19
Cost of travel	39	Entertainment	17
VFR (visiting friends and relatives)	29	Know language	17
Complete change	28	Easy to get there	11
Accommodation	28	Sport	10
Food and drink	23	Activities for children	9
Meet people	23	Close to home	3

Note: Multiple answers
Source: EUROBAROMETER

2.9 Conclusions Based on the Four Quantitative Data Sources

Although the data sources used to trace the relationship between city tourism and culture are not strictly comparable, all the evidence points in the same direction as far as tourist demand, motivation and activities are concerned.

Trends in city tourism

The TourMIS data indicate a strong growth in European city tourism up to the year 2000, followed by a slight decline in 2001 and 2002. Initial results for 2003 indicate a recovery, with growth in bednights averaging almost 4%. The recent decline seems to relate mainly to the impact of September 11, although economic factors are also evident. The recent decline in foreign arrivals in European cities has been compensated to a certain extent by strong domestic demand. In terms of the types of cities attracting visitors, larger cities in cluster 5 and 6 continue to dominate the market, but smaller cities in clusters 2, 3 and 4 seem to have been more resilient in the face of recent problems.

In overall terms, both the IPK International data and TourMIS show similar patterns of growth in city tourism arrivals until the peak year of 2000, followed by a decline in 2001 and 2002. This decline was reversed in 2003 with a growth in European city arrivals that outstripped global tourism growth. It is difficult to say whether culture has increased its share of the total city trip market based on the available data sources. Independent research by ATLAS (Richards 2001) however indicates that cultural tourism demand has tended to grow at about the same rate as total tourism demand. This would seem to indicate a growth in future cultural tourism demand as global tourism recovers, but not an increase in market share.

Profile of city cultural tourists

The city tourist who consumes culture has a similar profile to the cultural audience as a whole. Visitors tend to be predominantly female, highly educated with professional or managerial occupations and relatively high incomes. This confirms the image of cultural tourists as having high spending power. The one stereotypical image not confirmed by the data is the cultural tourist as ‘grey panther’. Although older cultural tourists do tend to undertake more cultural activities and spend more during their city trips, cultural tourism in cities is an activity followed by all age groups, with the peak age group in terms of participation lying between 20 and 30. However, those over the age of 50 tend to visit more cultural attractions on average than younger tourists.

Motivations and attractions

Culture is confirmed as the single most important motivation for city trips, although relatively few visitors view themselves as ‘cultural tourists’ (20%). A large number of city visitors are attracted by historic city centres, and museums account for a large proportion of cultural activities undertaken in cities, followed by art galleries and monuments. The cultural tourism product of cities is highly dependent on the inner circle (heritage and arts) in terms of attraction visits, but there is growing evidence that the more intangible aspects of culture included in the outer circle (lifestyle and creative industries) are becoming increasingly important in distinguishing between cities. This seems to indicate that intangible product elements such as ‘atmosphere’ are becoming more important for the consumer. This presents important challenges for the marketeer in terms of transmitting the essence of the atmosphere of the city to potential visitors.

Cultural events tend to be much less important than fixed attractions in city visits, probably because of temporal and information-related problems. The development of the European Cultural Capital event also points to a degree of event competition arising in Europe, where the international attention created by major cultural events will draw a significant proportion of the ‘mobile’ cultural public in any one year.

Information sources and booking

The most important source of information is personal recommendation from family or friends, but the influence of the Internet is rapidly growing. Internet bookings already account for about 9% of city cultural trip bookings and initial figures for 2004 indicate a rising trend. This points to the continuing importance of individual travel, with less than 20% of visitors having booked a complete package holiday. The majority of visitors make the decision to visit a cultural site before they leave home, and this is particularly prevalent among older visitors. However, over 30% of visitors leave their final decision until they arrive in the destination.

Mode of travel, accommodation and travel group

City cultural tourists travel relatively frequently by air to their city destination (over 40%) and they tend to stay in hotels, which partly accounts for their relatively high expenditure. The most frequent travel group is a couple without children, reflecting the DINKIES (double income, no kids) domination of the market. Groups with children only account for about 20% of total visits. Within the city destination, domestic visitors tend to travel by car, whereas foreign tourists are more likely to use public transport or walk.

Geographical distribution

In terms of the geographical distribution of trips, culture and heritage tend to be most important for those countries with a high density of urban population, tending to confirm the close link between urban (and particularly metropolitan) culture and cultural tourism. The major source markets in Europe are the UK and Germany, which account for almost 40% of all outbound city trips, which is not surprising given their importance as source markets for tourism in general. The highest levels, however, of foreign city trips per head of population are found in the smaller countries of Scandinavia and North-

West Europe, primarily because of the high level of cross-border trips by car. France, the UK and Germany are also the most important destinations for city trips, although cultural motivations tend to be highest for trips to Denmark, Germany, Switzerland and Italy.

Summary

In summary, it seems that although city cultural tourism continues to be dominated by the established 'cultural capitals' in clusters 5 and 6, there is evidence of trends towards more trips to smaller destinations and new regions of Europe. This shift seems to be based partly on novelty value and partly on the provision of new opportunities in terms of attractions and accessibility. There also seems to be a shift away from purely heritage based tourism towards heritage plus culture, or heritage plus culture and creativity. This is most clearly illustrated in the success of cultural events across Europe, which are increasingly based on creative rather than heritage assets. Although larger cities may be able to muster more heritage and cultural resources to attract tourists, the increasing importance of creativity as an attraction factor is creating a more level playing field in the cultural tourism market, since creative assets are much more mobile than heritage or tangible culture.

Endnotes:

1 Aachen, Amsterdam, Augsburg, Baden-Baden, Barcelona, Basel, Berlin, Bern, Bonn, Bregenz, Bremen, Brussels, Budapest, Copenhagen, Düsseldorf, Eisenstadt, Florence, Frankfurt, Gent, Genua, Graz, Hamburg, Heidelberg, Helsinki, Karlsruhe, Klagenfurt, Laibach, Lausanne, Leipzig, Linz, Lisbon, London, Luxembourg, Madrid, Milan, Munich, Münster, Nürnberg, Olmütz, Oslo, Paris, Regensburg, Rome, Salzburg, Saragossa, St. Pölten, Stockholm, Stuttgart, Tampere, Valencia, Venice, Vicenza, Vienna, Würzburg, Zagreb, Zurich.

2 Visiting friends and relatives.

3 In the last round of data collection, most interviews were held in spring/summer 2001, and do not therefore reflect the impact of September 11th 2001.

4 Visiting friends and relatives.

Chapter 3

Cultural City Tourism: A Growing Market

In this chapter the anticipated developments with regard to the growth of cultural tourism over the coming decades and the possible related effects are highlighted. The contents of this chapter are based primarily on the qualitative research carried out for this study namely the Internet poll [5], the workshops and related desk research. In this chapter and chapter 4 and 5 some results of the Internet poll are presented as illustrations in the boxes next to the text.

3.1 Tourism 2020

In the report "Tourism 2020 Vision", the World Tourism Organization (WTO) forecasts an increase in world tourism from 565 million international tourist arrivals in 1995 to 1,006 million arrivals in 2010 and to over 1,561 million arrivals in 2020. WTO expects the number of arrivals in Europe to increase from 338 million arrivals in 1995 to 527 million arrivals in the year 2010 and 717 million in 2020. This means an average annual growth rate of 3%. Despite the absolute increase in number of arrivals in Europe, the share of the region will drop from 59.8 % to 45.9% in the same period. This is caused by the relatively strong growth of share by regions such as the Middle East (annual average growth of 7.1%), East Asia and the Pacific (annual average growth of 6.5%) and South Asia (annual average growth of 6.2%). In comparison, the average annual growth rate for world tourism is forecasted to be 4.1%. Europe will, nevertheless, remain the region with by far the largest market share.

3.2 Cultural City Tourism: Who will Benefit?

According to a large majority of the respondents of the qualitative research carried out for this study, European cities will face an increasing demand for cultural tourism from mainly Asia over the coming five to ten years. The respondents are divided as to the demand for cultural tourism from South-America, North-America and Australia and New Zealand: for each region two out of five respondents expected the demand for cultural tourism from this region to increase and an equal number expects that the demand will remain the same.

Competition between cities in Europe in the area of cultural tourism will increase considerably

4 %	(totally) disagree
7 %	neutral
87 %	(totally) agree
3 %	no opinion

Source: Internet poll (n= 74)

The market for cultural tourism is expected to grow, but who will benefit from it? The competition between cities in Europe in the area of cultural tourism will increase considerably over the next five to ten years. In addition, the majority of the respondents expect at the same time that European cities as cultural destinations will experience more competition from cities in Asia, North and/or South America.

The assessment is that the total European market share regarding cultural tourism will drop in favour of Asia and America. In line with tourism in general, it is expected that the number of cultural tourist arrivals to European cities will grow, but cultural tourism to cities in other non-European regions will grow relatively faster.

During the workshops with cultural tourism experts it was also concluded that the traditional cultural tourism cities will lose market share in favour of relatively new destinations in Central and Eastern Europe and countries in former Yugoslavia. Reasons given for this development vary from:

- increasing competition from relatively new cultural destinations since the fall of the Berlin Wall in 1989;
- the current top ten cities for cultural tourism will suffer a set-back because they have been focusing on their traditional images for too long;
- the changes in the aviation branch that have brought about an increase of low-budget flights resulting in new destinations becoming more accessible for relatively large groups of potential visitors (such as the recent commencement of EasyJet flights between London and Ljubljana);
- the effect of the joing of ten new EU members and future additions to the EU.

The participants of the Thomson Future Forum [6] also expect the rise of new destinations in Eastern Europe and countries in former Yugoslavia. The participants claimed that Ljubljana and other cities and resorts in Slovenia, Croatia and Montenegro '*will appeal to a new generation of travellers who don't remember the Yugoslav conflict. Towns and cities that once few people had heard of will become mainstream. Access will be easier and cheaper with growth in no frills flights. Holidaymakers looking for 'the new Prague' can combine sightseeing, excellent food … based in a beautiful city just an hour's drive from Austria and Italy*.' It is, however, important to take into consideration that the horizon of the Thomson Future Forum is 20 years.

Does the above mean that cities in Western and Northern Europe face difficult times and that cities in Central and Eastern Europe face good times? Not necessarily, even though figures show that the supply side of cultural tourism has grown faster than demand (Richards, 1996). As tourism and cultural tourism are expected to grow considerably, as the WTO has forecasted, both Western and Eastern Europe will benefit from this growth.

There are also signs that the original 'curiosity factor' that stimulated a tourism boom for cities such as Prague in the 1990's is beginning to wane. For example bednights in Prague grew by 80% between 1995 and 2000, but fell again by 50% between 2000 and 2002 (Sager, 2003). (The drop in bednights in 2002 was partially a result of the flood of the river Moldau in Prague). Budapest has also under performed in recent years, with only a 14% rise in bednights between 1995 and 2002. In the short-term the ten new EU member states will benefit from the curiosity factor as new members of the European Union.

Furthermore, prosperity in Asian countries is increasing, therefore, travel is becoming more affordable and the barriers to travel such as closed borders and visa restrictions are slowly disappearing. For these 'new international tourists' the traditional cultural tourism destinations in Western Europe will initially be the most attractive destinations.

At the same time, there is a short-term trend that indicates a revival of 'traditional' Europe. The recent slow economic growth within Europe has had a negative effect on the spending pattern of the inhabitants in general. As a result of this development European destinations are more attractive due to the relatively low transportation costs. Another trend that will have a long term effect is the convergence on one hand between the high and popular cultures and on the other hand between the inner and outer circle of culture as presented in Figure 2 (the inner circle with the primary elements of cultural tourism such as heritage and arts and the outer circle with secondary elements such as lifestyle and the creative industries). For the cultural tourists it appears that the inner and the outer circle are becoming equally important and interdependent. Cities therefore that are able to offer both have an interesting proposition to offer cultural tourists. This is mainly an opportunity for cities in Southern Europe and for cities in Northern and Western Europe. For cities in Central and Eastern Europe this can be a threat, because some of these cities offer attractive museums and other cultural attractions, however, they often miss the intangible aspects that form part of the outer circle and that together create an attractive proposition for cultural tourists.

3.3 Visitor Versus Resident Ratio

Certain cultural places should realise that 'enough is enough' attracting more people would be damaging

14 %	(totally) disagree
16 %	neutral
66 %	(totally) agree
4 %	no opinion

Source: Internet poll (n= 74)

As described at the beginning of this chapter tourism in Europe will more than double in the period 1995 - 2020. Most cities will experience an increasing number of visitors in the coming years. Often, city authorities welcome this growth because of the economic benefits and the additional media attention their cities receive, however, they rarely take into consideration the possible negative effects and/or costs of tourism. For example, too many tourists can lead to a monoculture or ghetto forming and have the effect that certain functions disappear from the area (over)populated by tourists. An imbalance between the number of tourists and inhabitants can also lead to a decrease in the hospitality level, an important factor for incoming tourism. Too many tourists can also have a negative physical effect on the cultural heritage of a city and can lead to overcrowding of cultural attractions. Few authorities seem to be overly concerned with the tourist carrying capacity of the city and it appears as if 'more and more tourists' is the motto of many of the authorities. Is this a desirable situation? Or should certain culturally important places realize that 'enough is enough', because attracting more people would be damaging and have a negative impact on the experience of the visitors? The respondents of the qualitative survey agreed with the statement that for some cultural places enough is indeed enough. In fact, some small or large places suffer from an excessive number of visitors. This is not only a threat to the heritage itself - often vulnerable - but also to the quality of life for the inhabitants and for some economic activities. It can also be a threat for tourism itself. Congestion problems, pollution, overcrowding, an inauthentic feel, etc., will give the tourists less satisfaction; places thereby lose their quality and appeal as a visitor destination. Examples of places that operate on this borderline are Venice and Bruges. But even in those two cities, as in Oxford and Salzburg, respondents of surveys among inhabitants show they 'clearly felt that the overall effect of tourism in their city is positive or at least neutral rather than negative' (Van der Borg and Gotti, 1995). A survey among inhabitants that was recently conducted in the historic centre of Amsterdam had similar results (Gerritsma, 1999).

Cities are not defenceless against the process of increasing tourism in their city; they can actually take action. One of the possible solutions is the implementation of visitor management. Visitor management is the ongoing process of reconciling the potential needs of the visitors, the place and the host community (English Historic Towns Forum, 1994). Visitor management should be an integral part of the policy for places as it affects various issues such as traffic control, parking, signage, marketing, museums, hotel accommodation, shops etc. For cities for which tourism is relatively new, visitor management should be introduced early on during the development of tourism to manage the process and to create a sustainable form of tourism. At this stage relatively simple measures can be taken to create a well-balanced growth. When the flow of tourists is already greater and at times out of balance, stronger measures need to be taken, for example, increase the costs of the visit, restricting traffic, use of a booking system (such as the Venice Card), stimulate visitors to make use of alternative attractions in an wider area than the centre (dispersion in space) or stimulate visitors to come in the shoulder or low season periods (dispersion in time by extending the season). Furthermore, places could think about the kind of tourists they want to attract and/or stimulate (in as far as they have an influence on this aspect): day-trippers with a relatively low spend per visit, overnight visitors with a relatively high spend, individual or group tourists, etc. In other words places need to develop a clear strategy regarding the way they want to develop tourism and this is even more important when it concerns cultural tourism as it often entails cultural heritage, which is vulnerable and often irreplaceable.

In other words, the following questions need to be addressed:

- At what point does the ratio visitors:inhabitants have a negative effect on the experience of both the visitor and the inhabitant?
- What needs to be done to keep this ratio in balance so that it works for both groups (visitors and inhabitants)?
- What type of visitor(s) does the city want most to attract and what needs to be done to realize this?
- During which periods of the year does the city want to attract additional tourists?

3.4 Visitor Versus Heritage Ratio

The World Heritage List - developed by UNESCO with the intention of defining and conserving world heritage - can have the opposite effect due to the growing popularity of the heritage sites on the list. In a Dutch newspaper the Secretary-General of the International Council of Museums (ICOM), Mr. Brinkman recently claimed that "*The continuing existence of the list is at stake, something has to change. It's a Pandora's box. Worldwide icons have been turned into idols, tourists into paparazzi, art-lovers into cultural vandals. And what can been seen of the site fades in contrast with the visual violence of crowd handling. It is time that we formulate 'tourism politics'(Ex, 2004).*"

Some historic places are better off keeping their cultural product a well kept secret

51 %	(totally) disagree
24 %	neutral
19 %	(totally) agree
5 %	no opinion

Source: Internet poll (n= 74)

However, too little tourism can have a negative effect on cultural heritage. Abandoned to negligence and decay, lack of public interest and insufficient financial resources for its proper maintenance can be the consequence of too little tourism. That is possibly the reason why half of all the respondents held the opinion that keeping the cultural product of some historic places a well-kept secret is not the solution. A minority of the respondents, however, thought that some historical places are better off as a well-kept secret. The increasing interest in cultural tourism and the anticipated growth in numbers over the coming 25 years, requires alertness in what is acceptable from the point of view of heritage preservation and the need for authentic experiences. Instruments varying from (time) ticketing on one hand and the creation of replicas on the other hand are management tools that authorities have at their disposal.

Endnotes:

5 As mentioned in appendix 4, 74 respondents have participated in the Internet poll. Although the questionnaire was sent to people working in the tourism sector and cultural sector, the tourism sector primarily participated in the Internet poll. Only a few responses (in total 3) were from the cultural sector. For that reason no relation was established between the answers of the tourism sector and those of the cultural sector.

6 The Thomson Future forum was held in October 2003. This forum was held as part of Thomson's commitment to understanding and identifying consumers' changing needs and expectations.

Chapter 4

The Marketing of City Tourism and Culture

Effective marketing of the city cultural tourism will become increasingly important as the competition continues to grow between cities. And the competition is increasing: almost 90% of the respondents in the survey agreed that competition between cities in Europe in the area of cultural tourism will increase considerably over the next 5 to 10 years and the majority agreed that European cities will experience increasing competition from cities in Asia, North and/or South America. In addition, 95% (totally) agreed that places in Europe will increasingly use cultural tourism to promote themselves. Reason enough to believe that this will place stringent demands on the quality of the marketing of these cultural destinations. Striking is that when asked about the effectiveness of the marketing of cultural destinations only one third believe that 'most historic places promote their destinations effectively'. At the same time the majority is aware of the fact that 'marketing a place as a cultural destination is highly effective, as it significantly increases the number of visitors'. The results of theses statements indicate that there is a considerable gap between the potential and the realization of cultural tourism in marketing terms.

Places in Europe are increasingly using cultural tourism to promote themselves

0 %	(totally) disagree
5 %	neutral
93 %	(totally) agree
1 %	no opinion

Source: Internet poll (n= 74)

4.1 Product Development and City Cultural Tourism

In light of the convergence of the inner and outer circles of city cultural tourism (see figure 2, page 3) product development is increasingly important for those cities that want to stay ahead of the competition and want to continue to attract the increasingly critical and discerning cultural tourist. The participants of the workshops were in agreement that cultural product development should, where possible focus on the existing and distinguishing cultural values of a city as 'culture needs to be rooted in the community in order to be authentic and cannot be parachuted from outer space'. This approach offers a better opportunity for local initiatives to come up with new authentic products related to the culture, history and values of the place. The option, however, of developing new and unique cultural attractions that have no direct relation with the (history of the) place is one that has been applied by new towns in Europe, but also by towns and cities strongly dominated by industry with limited cultural product. The most visible current example of this approach has been the success of the Guggenheim Museum in Bilbao.

Due to scaling-up and global brands (i.e. Guggenheim, travelling mega exhibitions) places are losing their cultural uniqueness

47 %	(totally) disagree
16 %	neutral
31 %	(totally) agree
2 %	no opinion

Source: Internet poll (n= 74)

4.2 Innovation and Cultural City Tourism

'Innovation is the central issue in economic prosperity' according to Michael Porter of the Harvard Business School. This statement is almost certainly true for cultural city tourism, when you bear in mind the degree to which the number of cities claiming to be an interesting destination for cultural tourists is increasing and the fact that the number of cultural attractions over the last 20 years is estimated to have increased by over 100% (Richards, 2003). One way to respond to this increasing competition is to innovate, to create change. Not only within the inner circle of cultural tourism (the primary elements) but also in the outer circle (secondary elements) as important and distinguishing elements for the cultural attractiveness of cities.

More than two thirds of the respondents to the survey are of the opinion that cultural tourism in Europe is traditional rather than innovative. This outcome was also supported in some of the workshops where it was agreed that the traditional cities for cultural tourism in Europe are not innovative enough, resulting in a loss of market share in favour of relatively new destinations and cities with innovative products (such as Berlin, Barcelona and Bilbao). When a city not only wants to be attractive for first time cultural visitors, but also for repeat cultural visitors, then innovation of the cultural product is essential.

As is apparent from the quantitative data presented in chapter 2 the cultural tourist is in general well educated, relatively well-off and has a good job. Some of the data, however, also indicates that young people are also an important part of the city cultural tourism market, especially when destinations realize that if they have a positive experience of a destination at a young age they are more likely to return later in life. Understanding the quickly changing youth culture will therefore be an important part of cultural innovation for places that choose to target this market (Richards and Wilson, 2003).

4.3 New topics for Cultural Tourism in Cities

Cities are often increasing the scope of their cultural product in order to be able to continually respond to the needs of both the local inhabitants and the (foreign) visitors. It is interesting to notice that many of the new areas of interest are more closely related to the outer circle of the cultural tourism than in the inner circle (see Figure 2, page 3). A number of examples of such developments are:

The media: promotion and attraction

A major opportunity for cities is the use of media both to promote the city and as a potential attraction. Cities can provide attractive backdrops for films, television and video, especially when they are able to offer attractive cultural heritage or signature buildings such as the Tate Modern with the Millennium Bridge in London, the Reichstag in Berlin or the Guggenheim in Bilbao.

Many cities such as Barcelona are developing an active policy of attracting filmmakers. Featuring a city in a successful film, television programme or video clip can significantly impact tourism numbers, both domestically and internationally.

Cultural diversity and ethnicity

Cultural differences in ethnic terms are a potential resource for many cities, particularly as politicians and government authorities recognize culture as a potential instrument to stimulate integration: culture as a bridge between cultures. In Northern and Western Europe, cities such as London, Brussels and Rotterdam have used and are using ethnicity to develop particular 'ethnoscapes'[7] or

Cultural diversity (in ethnic terms) in many European cities is an underutilized aspect in the marketing and promotion of these cities

8 %	(totally) disagree
22 %	neutral
64 %	(totally) agree
6 %	no opinion

Source: Internet poll (n= 74)

cultural quarters to attract tourists such as Spitalfields and 'Banglatown' in London. Almost two thirds of the respondents to the qualitative survey were of the opinion that cultural diversity in ethnic terms is underutilized in the marketing of cities in Europe. When the outer circle of cultural tourism as presented in chapter 1 becomes more important, then the cultural diversity in ethnic terms is also of increasing importance for cultural tourism. It also offers cities in the short term the possibility to distinguish themselves from other cities. The integration of cultural diversity and city cultural tourism will be a fairly slow process due to the political sensitivity of this subject. There are, however, clear signs that this process has already started in various European cities with, for example, the introduction of 'urban safaris', multi- and intercultural food festivals, ethnic festivals etc.

Culinary culture

Re-inventing tradition is very important in Southern Europe. There is a long history of re-inventing traditions, gastronomy and cultural events. Gastronomy has become particularly important, as people move for food - an important motive in Southern Europe. The Italian initiative *Slow Food* [8] which has burgeoned into an international movement with over 80,000 members worldwide (35,000 of which are in Italy) concerns itself amongst other things with the preservation of culinary heritage and the promotion of slowness, rest and hospitality. *Slow Cities*, a spin-off of *Slow Foods*, has the following goals:

- implement an environmental policy designed to maintain and develop the characteristics of their surrounding area and urban fabric;
- safeguard autochthonous production, rooted in culture and tradition, which contributes to the typification of an area;
- promote the quality of hospitality as a real bond with the local community and its specific features, removing the physical and cultural obstacles which may jeopardize the complete, widespread use of a city's resources.

Design

Design and city cultural tourism have become increasingly linked over the last decade. This development can be seen in the growing number of design hotels (as well as art and boutique hotels) in Europe and the growth of design oriented hotel chains such as Design Hotels with hotels in cities in 18 European countries, Malmaison and W Hotels [9]. Also cities such as Vienna, Amsterdam, Berlin and Zurich have positioned themselves, especially in North America, as 'cool capitals'[10] with a focus on art, design, food, architecture, fashion and nightlife/music. While Milan has positioned itself as 'Italy's cool capital of design', Copenhagen has made design an important part in its positioning, and Antwerp has focused on contemporary fashion design [11].

Signature architecture for cultural institutions

The use of signature architecture to promote cultural institutions and in their slipstream the places in which they are located have taken flight during the last decade. Key examples of this phenomenon are the Guggenheim Museum in Bilbao designed by Frank Gehry and the Jewish Museum in Berlin designed by Daniel Liebeskind. But also smaller places have made use of signature architecture to position themselves as cultural destinations, such as the Auditorio de Tenerife in Santa Cruz de Tenerife, the Pinacoteca Giovanni e Marella Agnelli in (Lingotto) Turin and the Van Abbe Museum in Eindhoven. Detractors of signature architecture for cultural institutions have pointed out that the danger is that the context will dominate the content. Only when both the content and the context are of 'signature' level can they succeed over a long(er) period of time.

4.4 New Target Groups: Niche Markets

The international *urban dance scene* such as 'Sensation' in Amsterdam and, until last year, the 'Love Parade' in Berlin attracts large numbers of (foreign) visitors with a considerable economic impact. Cultural tourism also offers interesting opportunities to market to niche markets. In cities such as Paris, Antwerp, Barcelona, Prague and Amsterdam for example there is a specific niche market for Jewish heritage, which attracts small, but wealthy groups of tourists to these cities. This can also be used to develop markets for destinations not usually heavily visited, such as Girona, which has re-created its Jewish Quarter.

Some Western European cities on the other hand are likely to remain very popular with young travellers. Young travellers often see Paris and Amsterdam as the 'must-see' sites of modernity. These cities have the 'edge' that appeals to the young, particularly when this is associated with a more liberal atmosphere.

Also the growth of new subcultures provides an opportunity for places that can provide facilities specially geared to their needs. For example, Barcelona has become a Mecca for the skating community since the seafront was opened up with cycle paths and the inner city has been peppered with open areas with hard surfaces. These 'hard plazas' were intended as multifunctional areas for culture and recreation, but skaters have taken over some of these as their own. Significantly, the most popular is in front of the Museu d'Art Contemporani de Barcelona (MACBA), which provides a suitable hi-tech backdrop. Such sub-cultures indulge in a form of special interest tourism, which can be used to develop new markets for 'new' cultural destinations. There is also potential to use subculture media to market such products and destinations.

Another important change in the consumption of the city is the use of cities as vehicles for learning about urban living and the way cities are made and function. Many people who take city trips are consciously or unconsciously looking for ways of adapting to city life, or making life more livable in their own city. This leads to trips to cities that are perceived to be more successful in some way. There is some empirical evidence to back this up from the ATLAS surveys, which identify an important 'busman's holiday' element in cultural tourism: people working in museums visit other museums during their holidays, architects and town planners visit interesting buildings, places and/or exhibitions on architecture and town planning. Those interested in fashion, design or related subjects will be inclined to visit those places where these subjects are featured. This may also be one reason why 'cultural tourism' is so attractive to students and young people. There are already signs that some cities are recognizing this. Florence, for example, produces a special 'reading the city guide', which is directed at those wanting to know more about the development of the city and city lifestyles.

4.5 Festivals and Events

Cultural festivals and events are seen as an important part of the marketing of cultural tourism. They offer the tourist additional reasons to visit a place over and above the regular cultural product offered. Often because events are one-off and take place in a limited timeframe and because festivals offer a concentrated and often unique offering in a limited time period, they form an additional reason for cultural tourists to visit a place. They can cause a place to rise on the shortlist of places the tourist has in his or her mindset of attractive destinations. Festivals and events are both effective instruments in attracting first time visitors as well as repeat visitors due to the differential advantage they can offer.

Cultural festivals and events are important reasons for cultural tourists to choose to specifically visit a place

4 %	(totally) disagree
5 %	neutral
88 %	(totally) agree
1 %	no opinion

Source: Internet poll (n= 74)

Cultural festivals and events have found their way in both large cities and metropolises and in small towns and villages, which otherwise would not feature as cultural tourism destinations. Examples are the Poetry Summer offering a festival of word, image and architecture from July to September in Watou, Belgium or the Oerol Festival of site- specific theatre on the island of Terschelling, The Netherlands held annually in May or June, or the opera festival Savonlinna in Finland held from July to August or the International Festival of Theatre and Street Arts in Valladolid, Spain held in May.

There is also an indication that the number of cultural festivals and events in Europe is increasing along with the number of mega-festivals and mega-events with parallel budgets. Not only the well-established festivals such as the Edinburgh Festival or the Salzburger Festspiele have large budgets, but also newcomers such as the 'Ruhr Triennale' (2002) with over € 40 million and the Mozartjahr (Mozart Year) in Vienna (2006) with well over € 30 million have large budgets.

Major events such as the Olympics and the World Expositions have in the past been vehicles for development and/or regeneration, particularly where cities want to tie tourism development to leisure, culture and urban (re)development. After the effects of the Barcelona Olympics in 1992 Barcelona has for the second time used a large-scale cultural event, the Universal Forum of Cultures 2004, to regenerate an impoverished part of the city and at the same time attract an estimated 7 million visitors. The programme of the Forum 2004, which had a strong cultural component lasted 5 months and cost € 341 million. The total costs of the infrastructure surrounding the event, which was spent over a 5 year period, was estimated at € 3 billion. For this event Barcelona has, (as was the case with the Olympic Games), set the standard for a new level of cultural event in Europe. It is, however, worth noting that there is currently little coordination of large-scale events between cities. Not only was the Barcelona Forum being held in a year in which the Olympic Games were held in Athens, but there was also another UNESCO-supported World Forum happening in Sao Paolo in 2004.

4.6 Cultural Capitals

Many cities are interested in being 'Cultural Capital of Europe' (in 2004 the Cultural Capital cities are Geneva and Lille). The most important reasons for this are:

- the publicity the cities obtain during the year that the city is Cultural Capital;
- the extra tourists that visit the city during the year of being Cultural Capital;
- the impulse that it gives to the cultural product and infrastructure of the city;
- the long term effects on the image and the number of visitors to the city.

For these reasons many local and regional authorities are willing to invest large amounts in the innovation of the cultural product as in the promotion of the Cultural Capital. However, the figures in appendix 8 show that the long-term effects of the Cultural Capital year in the number of visitors are limited. It suggests that the Cultural Capital year creates a boost in the number of visitors in the year it is held, but within two or three years the number of visitors returns to the level before the Cultural Capital period. This is not the opinion of almost half of the respondents of the survey. They believe that being a Cultural Capital contributes to higher numbers of visitors to the city in the period after the Cultural Capital year. This apparent discrepancy between 'objective' visitor statistics and 'subjective' opinions may partly be due to the wider and intangible effects of the Cultural Capital event, but it is also in large measure due to a lack of data on and evaluation of cultural events. Relatively few event organizers seem to view evaluation as part of the process of staging an event, and surprisingly few cities seem to demand an extensive evaluation as a condition of funding them.

Being a European Cultural Capital has no long term effect on the number of visitors to the city

47 %	(totally) disagree
22 %	neutral
27 %	(totally) agree
4 %	no opinion

Source: Internet poll (n= 74)

An interesting and surprising outcome of a recent study into the economic and social effects of the Cultural Capital year in Bruges in 2002 was that the satisfaction level in terms of price:quality ratio of visitors to Bruges in 2002 was lower than in the two preceding years (WES, 2004). A possible explanation of this is the extra congestion caused in a normally congested town and the increase in (hotel and restaurant) prices during 2002. This underlines the value of conducting more detailed evaluative research in order to understand the dynamics of city tourism and culture. Robert Palmer who headed the Cultural Capital years in Glasgow and Brussels estimates that '*only a third of the 40 cities which held the Capital of Culture title have reaped financial rewards*'(Liverpool Daily Post, 2003).

4.7 Promotion and Distribution of Information

New technologies such as the Internet have and will continue to have a noticeable effect on the promotion and distribution of cultural products. Prior to the Internet the promotion and distribution of cultural tourism products and services formed a major problem, as the programmes, dates, availability and prices were often not known at the time of printing traditional brochures. The Internet has offered a solution to this problem as the cultural sector can continually update the information and the cultural tourist can gather the information about the cultural product, visiting hours, tickets etc. independently. The demographic profile of the cultural tourist as indicated in chapter 2 is one of an independent traveller who is more inclined to use the Internet as a data collection source. The ATLAS survey already shows that the Internet is one of the major information sources for the cultural tourist. In addition, the Internet also offers the opportunity to offer the information in the language of the traveller; the website of the Vienna Tourist Board will, for example, be available in 12 languages in 2004.

The ATLAS surveys indicate that the use of information gathered at home by foreign visitors in and to Europe increases with distance between country of origin and destination. This tends to support the idea that visitors who travel further are more likely to visit the 'must see' sights, and will focus on a narrower range of attractions. Visitors from outside Europe - as is to be expected - also tend to use a greater range of information sources than domestic tourists or European visitors, this indicates a greater time investment in seeking information with increasing distance from the destination.

Endnotes:

7 See Shaw, S. (2003) Inner city ethnoscapes and cultural tourism: Lessons from Canada and the UK, ATLAS expert seminar Cultural Tourism Group, Barcelona.

8 See www.slowfood.com for information on Slow Food and Slow Cities.

9 See www.designhotels. com, www.malmaison.com, www.starwood.com/whotels/index.html.

10 See www.coolcapitals.com

11 In 2001 Antwerp organized a theme year under the slogan 'Antwerp = fashion = culture = mode 2001'.

Chapter 5

Cooperation and City Cultural Tourism

Cultural tourism exists due to the existence of both a cultural sector and a tourism industry. The cooperation between these two is not always easy. This chapter opens with a paragraph regarding how the potential between the two sectors can be better realized and further identifies various areas for cooperation within the field of cultural tourism. The findings in this chapter are based on the qualitative research, the workshops and desk research.

5.1 Different Worlds

Often culture is associated, rightly or not, with quality and elitism whereas tourism is associated with commerce and mass culture. Two very different worlds. Both sectors have their own language, their own objectives and their own modes of operation. The differences between the two are often considerable and not easily overcome. This is also apparent in the survey where two thirds of the respondents agreed with the statement that the two sectors do not speak the same language and that cultural organizations are generally too heavily focused on their own product/service, rather than on the needs of their visitors. This result is even more extreme when we take into consideration that most of the respondents work in the tourism sector. It is, however, not unrealistic to expect that the differences between culture and tourism will slowly reduce as culture becomes more commercial and commerce more cultural. In addition, tourism is increasingly more about art and culture as the European tourism market becomes more individual.

Cooperation between cultural organizations and tourist organizations is difficult, as they often do not speak the same language

19 %	(totally) disagree
14 %	neutral
66 %	(totally) agree
0 %	no opinion

Source: Internet poll (n= 74)

The cultural tourism seminar [12] held in 2001 in Brussels by the Scottish Executive and the British Tourist Authority concluded '*There is little doubt that the worlds of culture and tourism initially approach the concept of cultural tourism from very different perspectives.*'

There are a number of actions that can be taken to improve the cooperation between cultural and tourism sectors and to bring the perspectives closer together:

- when cooperative activities are undertaken take sufficient time to get acquainted with each other; this often takes, weeks and months rather than hours;
- formulate clear goals so that it becomes clear from the outset what the common goals are and where they differ;
- respect each others' aims, needs and situation;
- be aware that each sector has its own jargon; terms used in the cultural sector are not common knowledge in the tourism sector and vice versa;
- realize that cultural tourism is based on mutual cooperation; cultural tourism cannot exist without either culture or tourism;

- develop when possible cooperative activities, be it promotional activities or cooperative productions, thereby creating a common sense of ownership;
- be aware of the different roles and areas of expertise of both sectors; the content of an exhibition or a cultural festival is the task of the cultural sector, while the tourism sector is more an expert in context, such as promotion, distribution, clustering, reservations, etc.;
- bear in mind the need for effective planning; often tourism promotion organizations and tour operators need a longer lead-time than the cultural sector usually works with;
- involve people who have experience in the cross-over between both worlds so as to bridge the gap.

In addition to this, a structured dialogue between the two sectors would lead to a better understanding and cooperation. Also the publication of best practices and case studies within Europe will lead to a better (mutual) understanding of cultural tourism.

5.2 Partnerships around Cultural Themes

Many cities, with the exception of the metropolises, work with themes to promote cultural tourism. In the realization of the themes many different partners are involved varying from cultural institutes, to restaurants and cafes, transportation companies, shops etc., offering interesting opportunities for private-public partnerships. In many cases one of the underlying targets of such themes is to bring parties together who do not normally work together. In the theme year different aspects of the culture of a city related to the theme are highlighted and linked. This cooperation and planning requires a lead-time of years in order to be able to realize the inherent potential. Cultural themes are linked mostly to clusters 4 and 5 (cities) rather than to cluster 6 as the metropolises already have large and varied cultural offerings and they do not feel the need to develop thematic promotional activities. Cultural themes are also in some cases developed on a national level.

Public/private partnerships offer interesting development opportunities for cultural tourism

1 %	(totally) disagree
3 %	neutral
92 %	(totally) agree
4 %	no opinion

Source: Internet poll (n= 74)

Another option is to link the theme of a city with cities with a comparable product. The grouping of cities around themes is particularly important in the South, as seen in the strong participation in the Arts Cities of Europe network. But also in other parts of Europe, cities link themselves, for example 'Magic Cities Germany' (with ten participants, including Berlin, Dresden, Frankfurt, Hamburg, Cologne and Munich), the Golden Triangle (Budapest, Vienna and Prague) or Historic Highlights of Germany (with 13 participants such as Augsburg, Bremen, Lübeck, Munster, Potsdam and Würzburg).

The question is, is linking places with a theme in a relatively small region a potentially successful strategy? In The Netherlands five historic towns - Haarlem, Leiden, Delft, Dordrecht and Schiedam (towns in cluster 3 in Figure 4, page 5) - were linked in the promotion around the theme of historic towns (Het geheim van Holland/the secret of Holland). After four years the project was stopped due to disappointing results. The cultural tourists who visited the towns visited only one or at most two towns included in the promotion. Because of the perceived resemblance between the towns it was not interesting enough for tourists to visit more than one or two of the towns. Interestingly, one of the towns that participated in the initial project, namely Delft, has subsequently linked their promotion with Rotterdam. The town has chosen a strategy to link itself with a city nearby, but with a totally different cultural product and size, instead of linking itself to towns with a similar product and size.

Themes are also increasingly used to develop itineraries or routes between cities, thereby producing a geographical dimension to the theme. One of the most successful examples of this has undoubtedly been the ‘Camino de Santiago’ in France, Spain and Portugal. The success of this themed route has been based on a combination of tangible and intangible cultural heritage, collaboration between public authorities and private suppliers and a product which meets a growing need in the European tourism market (particularly the growth of spirituality). In many cases, however, the development of themes and routes has been product rather than market led, with very mixed levels of success.

5.3 City Cards and Cultural Tourism

A collective product that is also used mainly by cities in cluster 5 and 6 to promote aspects of cultural city tourism are city cards. These cards are offered for varied prices depending upon the duration. The cards offer free entry to (cultural) attractions, often combined with special offers for transportation. Examples of such cards are:

- London Pass (www.londonpass.com);
- Amsterdam Pass (www.visitamsterdam.nl);
- Vienna à la Carte (www.wien.info);
- Stockholm Card (www.stockholmtown.com);
- Copenhagen Card (www.woco.dk).

Endnotes:

12 Culture and Tourism - are we talking the same language? March 2001 (the report can be downloaded from www.scotland.gov.uk/euoffice).

Chapter 6

Opportunities for City Cultural Tourism

This chapter summarizes some of the main opportunities for city tourism and culture. It also indicates the most important type of cities for which these opportunities are relevant.

City tourism and culture - a strong partnership

Many of the outcomes of this study indicate that city tourism and culture are strongly (inter)related. Even though only 20% of city tourists rate culture as their prime motivator, a far greater number are actually involved in cultural activities while on a city trip. This indicates that a large number of city trippers do not see themselves as (city) cultural tourists, even though the activities they undertake indicate that they are. This has far reaching consequences for the marketing of towns and cities as cultural destinations, especially to those travellers who do not perceive themselves as cultural tourists, and how these (potential) travellers are addressed. The purposeful cultural tourist and the sightseeing cultural tourist need to be addressed in a different way and on a different level as their motivations differ considerably. This has implications for both the message as well as the tone of voice.

Culture as a prime motivator or as décor

In presenting a place as a cultural destination it is important to bear in mind that for some visitors culture is the prime reason for travel while as for others culture, and particularly cultural heritage, forms a décor against which other activities such as sightseeing, eating and drinking, etc. are undertaken. In both cases culture plays an important, but very different role.

Favourable demographic trends

The demographic developments in Europe during the coming ten to fifteen years strongly favour cultural tourism as the group of potential travellers older than 55 years will grow significantly. Within this group there is a large section with high travel participation, a high educational level and a high disposable income. In addition, this group also has relatively more time available for travel and cultural activities. As can be seen from the quantitative data in chapter 2 the older travellers are traditionally interested in city cultural tourism. Due to the high mobility of this demographic group they have a broad range of travel destinations to choose from. Futhermore, the fact that this group is increasingly savvy, demanding and critical, will place greater pressure on the level and quality of the communication/marketing and on the products and services delivered by the cities and the cultural institutions/organizations.

The novelty factor and city cultural tourism - a short-term opportunity

Since the fall of the Berlin Wall and the opening up of Central and Eastern Europe there has been a marked shift to visiting cities in these countries. Cities in clusters 4, 5 and 6, such as Berlin, Prague and Budapest have clearly benefited from the novelty factor for both the purposeful and the sightseeing cultural tourist. In all likelihood cities and towns in the recent ten new EU member countries will also benefit, partially due to the same novelty factor. On a more micro level new innovative museums and attractions of interest to cultural tourists, often with signature architecture, such as the Guggenheim Museum in Bilbao or the Jewish Museum in Berlin, have also benefited from the novelty factor. In the long run, when the novelty has worn off, these towns, cities and individual attractions will have to offer a quality product and/or service in order to be able to maintain the momentum and interest of the traveller.

The need for innovation

Innovation is important for keeping a place on the cultural tourism map and for attracting repeat visitors. The need for innovation due to the ever-increasing competition between cities and towns will be more strongly felt by the places in clusters 4, 5 and 6 than the other clusters. In clusters 1 and 2 where heritage is the main attraction for visitors, product innovation will play a lesser role, as visitors are primarily interested in authentic cultural heritage. For clusters 1 and 2, and possibly 3, the innovation will concentrate primarily on the areas of communication and presentation. The innovation for clusters 4, 5 and 6 will focus on both the hardware (such as new cultural institutions) and software (such as new cultural festivals and events). For these clusters, innovations in the fields of communication and presentation will also play an important role.

Cultural festivals and (mega)-events

Cultural festivals and mega-events offer interesting opportunities for places on various levels:

- Large scale cultural festivals and events offer a place the opportunity to invest in the infrastructure whereby even if the event of a festival is a one-off activity it can have a lasting sustained effect on the quality of the place. The Cultural Forum held in Barcelona in 2004, but also the various European Cultural Capital years are all examples of such opportunities;
- Such events, because they take place in a limited timeframe and because they offer a unique one-off experience, can be used to influence the position a place has in the long and shortlist of places the potential traveller wants to visit. The effect is that the place where the event is held will rise on the list of potential destinations in the mindset of the traveller, due to the sense of urgency created by events with a limited duration;
- Such events often attract likeminded visitors thereby offering them much-needed face-to-face activity centres (in the words of Sir Peter Hall). In the western society, which is becoming increasingly individualized where traditional meeting places are fast disappearing, cultural festivals and events can offer new opportunities for meeting likeminded people. Here the social aspect is as important as the content.

The importance of authenticity and visitor management

With increasing globalization and mass production leading to a greater uniformity worldwide, the value of authenticity or even faux authenticity will become increasingly attractive to cultural tourists. Linked to this need for authenticity is a sense of nostalgia, a longing for the 'simplicity' and 'honesty' of the past. Movements such as 'Slow Food' and 'Slow Cities' are a clear result of this desire. Authenticity for the cultural city tourist is not only based on what he/she sees, but equally on the quality of the experience. Over-crowding, for example, can severely influence the experience of the authenticity, but not always in negative terms. The sheer mass of the 'Love Parade' in Berlin was part of the attractiveness and of the experience. However, for certain forms of cultural heritage and the visual and performing arts, a more reflective atmosphere is required in order to be able to fully appreciate it. Here visitor management can play a crucial role in protecting both the cultural heritage in physical terms as well as the experience of this heritage in the eyes of the visitor. Because places in clusters 1, 2 and 3 are by and large small(er) they are more susceptible to over-crowding and the related negative effects. Because cultural heritage in clusters 1, 2 and 3 is of primary importance visitor management plays a very important role here, especially when taking into consideration the fact that the WTO expects travel to Europe to increase by over 50% in the period 1995-2020, while many of the cultural heritage sites will not increase in size.

The creative city as a competitive concept

Cities and metropolises in clusters 5 and 6 are increasingly discovering the concept of the creative city as a differential advantage. The creative city links the traditional cultural products, services and heritage with the creative industries such as media and entertainment, design, architecture, fashion, etc. Those cities that are successfully able to offer this along with an open and tolerant environment will be successful in attracting not only the 'creative class' as inhabitants and workers, but also as travellers. Having a strong cultural product along with the creative industries is not sufficient to be a successful creative city. Tolerance and diversity are also key ingredients. Or in the words of Arthur Ransome, "Bohemia is not a place, but a state of mind".

In a report, 'The Image of Europe in North America', commissioned by ETC, members of the United States and Canadian travel trade said travellers from those countries'generally have positive perceptions of Europe'. Also '*they strongly associate Europe with history and historical attractions, culture, and gastronomy*'. Some of the recommendations for promoting Europe made by the U.S. and Canadian trade were:

- "*focus on the things that make Europe special for Americans and Canadians and that differentiate it from the United States and Canada. First and foremost should be Europe's history and historical attractions*";
- include in the promotional imagery '*historical attractions', 'lifestyle' scenes, and easily recognizable icons*'.

In these recommendations and elsewhere in the report, it is clear that it is not only the primary elements (inner circle) of culture that are of value to the U.S. and Canadian traveller, but also the secondary elements (outer circle) such as lifestyle etc. To quote, "*the trade believes that Europe possesses a very appealing culture, although culture tends to be an extremely diffuse concept that incorporates the people, their lifestyles, their traditions, their attitudes, and their languages. For many, gastronomy, music, and art are also key elements of Europe's culture*". Cities which can combine the elements of culture in the outer and the inner circle therefore can offer the most appealing and attractive product for the North American tourists in general and also for the purposeful cultural tourist.

Stop. Look. Go.

Because of the complexity of the subject - city cultural tourism - and because of the fast changes in the market and the segmentation of the market, more in-depth comparable data is needed in order to better understand the market and how it is developing. In view of the expected increasing competition between cities, but even more so between Europe and other continents, it will become increasingly important to have the advantage of better understanding of the motives and behaviour of the city cultural tourist. Definite steps have been taken in this direction, however, as is apparent in chapter 2, the comparability of the data is limited.

The differential advantage between the spider and the fly, is the web

Creation of a 'web' of cooperation between places can be an effective way of reinforcing each places' product and of drawing additional visitors. It needs, however, to be clear upfront whether the cooperation is supply side and/or market-driven. If market-driven then it needs to be differentiated to the needs of the market and in many cases the market needs of, for example, domestic travellers will be very different from far away visitors. The information needs and desired experiences of these two groups will be very different. Especially places in clusters 1, 2 and 3 can benefit by cooperating, as in this way they can combine limited (promotional) budgets. This is especially true for promotion to long haul markets. Cities and towns can also benefit on a more micro level by encouraging the cultural sector along with the tourism sector to develop more collective marketing activities. Such marketing activities in Europe are in most places still in very early stages of development.

The degree to which the tourism and cultural sectors learn to understand each other's language and to cooperate based on respect for each sector's core competencies, will determine how successful each place, country and ultimately Europe will be in effectively responding to the increasing competition in the field of city cultural tourism.

Appendix 1

Invitation to Tender

1 Introduction

City tourism is of major importance in the marketing efforts of European National Tourism Organizations (NTOs) in cooperation with the cities in their respective countries. It relates both to intra-European as well as to intercontinental tourism. The **European Travel Commission (ETC)** intends to commission in close cooperation with the **World Tourism Organization (WTO)**, a study on holiday trips to European cities with a cultural motive.

2 Purpose of the Study

The purpose of the study is to increase the knowledge on cultural city trips for the members of the ETC (the NTOs of 33 European countries - see Annex C), for individual European cities / tourist offices, and for the WTO.

Though it may be difficult to distinguish cultural city trips from other city trips, the cultural element / motive is the prime factor to concentrate on.

With reference to cultural elements which motivate tourists, we regard at least the following items to be relevant :

- Museums;
- Theatres (plays, concerts etc.);
- Events and festivals (with a cultural aspect);
- Exhibitions (especially art exhibitions, including those held in museums);
- Historic buildings, in particular those creating specific townscapes;
- Specific gastronomy;
- Specific crafts.

The main objective is to create a conceptual framework with a structural approach that can be broadly used in practical marketing (especially communication) and product development. The proposal should provide information on how it is envisaged that the specified objectives can be met.

3 Organization of the Study

In addition to a conceptual framework based on available literature, it is envisaged that the study should consist of two main additional sections. The first part is an inventory and analysis of available quantitative data, and the second a survey amongst suppliers via in-depth interviews. In the final report, both additional sections should be integrated into a logical structured overview. The study will be carried out by one institute with a proven track record in travel research, and ETC should be recognized as being the contractor and commissioner of the study.

4 Scope of the Project

Quantitative part

Based on information received in the preparation of this invitation to tender, four sources for analysis can currently be identified :

1. A special report on *European Outbound City Holiday Trips*, based on data from the *European Travel Monitor 2002* (source: IPK International). An overview of its contents is enclosed in Annex A, and will be made available to the institute that is commissioned;
2. Arrival and overnight statistics (by nationality) for European cities. This data can be obtained from the *'TourMIS'* website www.tourmis.info (by the University of Vienna and the Austrian Tourist Board), managed for European Cities Tourism (ECT, formerly FECTO) www.europeancitiestourism.org.
3. Special visitor surveys carried out by specific cities / tourist offices of cities. Some have been executed in the same format (*EUROCITY project*) and can be retrieved from 'TourMIS'. The manual for the Visitor Surveys can be found on the ECT website (See Annex B for the list of EUROCITY studies already available.)
4. All other known relevant publications and studies available from third parties and publishers, or which have been identified during the course of the study.

Extensive tables on specific countries, and as many specific cities and segments as possible, should be made available in an Annex to the report.

Qualitative part

This part should focus on qualitative marketing information. We envisage in-depth interviews with relevant tour operators, airlines, coach operators, city tourist offices and other knowledgeable key persons in Europe and other continents. The tender should provide details on how this information will be collected.

Particular attention should be given to the following items:

Given ETC's role, which is to stimulate intercontinental tourism to Europe, special emphasis should be given to the development of intercontinental cultural city tourism to Europe, in particular from the USA, Canada and Japan and, if possible, other emerging Asian markets. A distinction between 'organized' and 'individual' overseas travellers is important, as the distinction between 'organized' and 'individual' travelling is relevant for Europeans.

The following items should be included in the interviews:

- off-season aspects;
- short break (second) holiday making;
- length of stay;
- motives and different types of travellers;
- decision-making processes and buying process (also by segments);
- importance of image and atmosphere of the cities;
- trends;
- new opportunities (e.g. via low cost carriers);
- changes in preferences and possible reasons for this;
- competition between cities / benchmarking;
- the possibilities for combining cities in itineraries;
- problems in infrastructure;

- problems in cultural supply;
- problems in marketing;
- the role and use of special products (e.g. city cards);
- operational problems which the tourism industry has, and ways of solving them;
- possible examples of successes and failures;
- distribution of information and problems in obtaining information;
- the possibilities related to special projects - such as European Cities of Culture.

These items will partly coincide with the data retrieved in the quantitative part.

Additional remarks on both parts:

- ECT (European Cities Tourism) has expressed its interest in the study, and is prepared to be of assistance to the institute commissioned, for both the quantitative as well as the qualitative part of the study;
- If possible, tables should be standardized in terms of both format and items;
- A systematic comparison should be the target;
- As cities differ, it is thought to be advisable to cluster the cities into 7 to 10 recognizable types, based on the local tourism offer and demand. The tender should provide information on how and which clusters can be recognized;
- It is envisaged that the study should provide information on segments in demand (e.g. for general cultural highlights, special interest for in-depth arts experiences, or for contemporary culture such as architecture);
- An analysis on how cities organize their promotional activities, and how the industry promotes its offer (e.g. via websites and catalogues), and with what characteristics, is also envisaged.

5 Budget

ETC and WTO have allocated a total budget of € 30,000 for this study, and the proposal should be made within this budgetary constraint. ETC expects to be billed in Euros for the work done.

The final payment (25% of the costs) will be made only after approval of the final draft by ETC and WTO.

6 Deadline for Submission of Proposals to ETC

Documents should be submitted to the ETC Secretariat in Brussels by **end of business on 31 August 2003** at the latest.

Please send a copy of your proposal by e-mail to: l.davies@pi.be
and to: hbos@holland.com

7 Delivery Date and Form of Study

The study should be finished before **31 December 2003**. The draft will be evaluated and approved by ETC and WTO.

A progress report by the institute commissioned with the study should be made available by **1 November 2003.**

ETC will require a full report and a PowerPoint presentation of the results of the study.

The institute commissioned should be prepared to present the findings in February 2004 at ETC's Annual Research Directors' Meeting in Germany (place and date to be confirmed).

N.B. All documents should also be made available to ETC and WTO in electronic format suitable for e-mail distribution. The full report should also be made available in diskette format.

8 Tender Evaluation

The contract will be awarded on the basis of the agency's proven ability to deliver on the stated objects. The selection criteria used by ETC and WTO will include the relevant experience of the project team, in particular the persons in charge, the level of innovation and imagination brought to the project, and the commitment to delivery of results within the time frame and costs.

A different study approach to obtain the information requested in this invitation to tender will be considered, if presented with good justification.

9 Miscellaneous

Please note that ETC and WTO are the exclusive owners of the report and are free to decide on its use.

ETC Executive Unit, Brussels
July 2003

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Annex A

Contents of European Outbound City Holiday Trips

The available data provides an overview of the travel demand for European outbound city holiday trips, as well as an overview of the activities and social structure of these city holiday trips. It concerns only tables on holiday trips, business trips or VFR (visits to friends and relatives). Other trips are not included. It concerns city holiday trips defined as 'a stay in a city only' (e.g. touring holidays including a city visit are not counted).

The data comprises:

- An *origin-destination matrix* of city holiday trips where (in rows) the top-20 countries of origin (+ a row for 'other countries') are listed, as well as (in columns) the top-22 destination countries (+ a column for 'other destination countries');
- *Per country of origin* (20 + others) - a division of city holiday trips by the various means of activity (e.g. what are the activities of Germans on their city holiday trips abroad);
- Per country of *destination* (22 + others) - a division of city holiday trips by the various means of activity (e.g. what are the activities of foreign visitors on city trips to Austria);
- Per *country of origin* - a division of city holiday trips by sex, age and social structure;
- A table for the remaining ETC-countries providing information on the *number of inbound city trips* for these countries (not subdivided by countries of origin);
- A short table providing information on the total *volume of intra-European city holidays* for the period 1998 – 2002.

Annex B

EUROCITY studies available

City	Status
Budapest	pilot city in 1998
Dublin	started in 1999
Heidelberg	started in 1999
Berlin	started in 2001
Amsterdam	started in 2001
Copenhagen	Planning phase
Lisbon	Planning phase
Tallinn	starting in 2002
Vienna	starting in 2002

Annex C

The members of the European Travel Commission (ETC) are the National Tourism Organizations (NTOs) of the following 33 countries:

1. Austria
2. Belgium
3. Bulgaria
4. Croatia
5. Cyprus
6. Czech Republic
7. Denmark
8. Estonia
9. Finland
10. France
11. Germany
12. Greece
13. Hungary
14. Iceland
15. Ireland
16. Italy
17. Latvia
18. Lithuania
19. Luxembourg
20. Malta
21. Monaco
22. Netherlands
23. Norway
24. Poland
25. Portugal
26. Romania
27. Slovakia
28. Slovenia
29. Spain
30. Sweden
31. Switzerland
32. Turkey
33. United Kingdom

Appendix 2

List of Relevant Literature on Cultural City Tourism

As part of the secondary data collection - the desk research - LAgroup has compiled a list of (research) studies, books and other publications concerning city tourism and culture, at regional, national and European level. *The actual publications do not form a part of this report*. A number of National Tourist Organizations provided LAgroup with relevant publications and the list has been completed based on further desk research. All titles, names and dates have been included to the best of our knowledge, based primarily on the input from third parties. This list is a selection of relevant publications and does not claim to be a complete overview.

The publications are listed according the following division:

- General publications and books;
- Publications and books on cultural city tourism;
- Specific publications and books on cities;
- Specific publications and books on countries;
- Publications and general books for Europe;
- Articles;
- Presentations.

	City tourism & culture General publications and books	Author	Year	Content	Language
1	Cultural impact: measuring the economic effects of culture	Anderson, D. and Nurick, J.	2002	Major capital projects in the cultural sector are increasingly being asked not just to perform a cultural or educational role but also to boost their local or regional economy. How can they make a difference?	English
2	Realising the potential of cultural services: making a difference to the quality of life	Arts Council of England/LGA/ CLOA/ILAm et al	2001	The purpose of the paper is to identify the need for various cultural services.	English
3	Heritage and tourism: an arrangement, two problems and three solutions	Ashworth, G.J.	1992		English
4	Tourism and spatial transformations: implications for policy and planning	Ashworth, G.J. and Dietvorst, A.D.J.	1998	The purpose of this book is to examine the transformation of space and draw out the implications for tourism policy and planning.	English
5	Metroland: the urban tourism market	Beioley, S.	2002	Richard Prentice presents a detailed analysis of heritage tourism by understanding the way in which the benefits gained from visits to attractions are received. This exploration into the nature of the heritage "product" calls into question the terminology used to define this aspect of the tourism industry.	English
6	Urban tourism	Berg, L. van den	1994		English
7	Managing quality cultural tourism	Boniface, P.	1995	Managing quality cultural tourism is an authoritative look at how to manage cultural tourist sites to best meet the needs of the visitors, the presenters and the site itself. As cultural tourism increases the management of heritage sites becomes more complex.	English
8	Are museums putting heritage under the domination of the tourist industry?	Boniface, P.	1998		English
9	Tourist historic cities	Borg, J. van den, et al		unknown	English

	City tourism & culture General publications and books	Author	Year	Content	Language
10	The art of travel	Botton, A. de	2002	In 'The art of travel', Alain de Botton, best-selling author of 'The Consolations of Philosophy', tackles the curious business of travelling. He writes about airports, landscapes, museums, holiday romances, photographs, exotic carpets and the contents of hotel mini-bars.	English
11	Prospectives urbanistique et socio-economique	BRAT	1992		French
12	Culture and tourism: are we talking the same language?	British Tourism Authority	2001	This paper investigates what cultural tourism means for regions in Europe similar to Scotland and it examines some of the practical approaches they have adopted.	English
13	Expressions of culture, identity and meaning in tourism	Centre for travel and tourism	2000		English
14	Projects Pilotes Urbains - Rapport Anuelles 1997	Commission Europeenne	1998		French
15	Stimulering van cultuurhistorisch toerisme: een kwestie van samenwerken	Coopers & Lybrand Management Consultants	1992	A research in relation to the development and selection of two pilot-concepts to stimulate culture-historic tourism.	Dutch
16	Arts development: full report and proceedings of the committee	Department for culture, media and sport (Great Britain)	2002		English
17	National museums and galleries: funding and free admission	Department for culture, media and sport (Great Britain)	2002		English
18	Toerisme herondekt erfgoed! markt voor erfgoedtoerisme: een integrale visie	De Vries en Hopman Advies	1996		Dutch
19	Arts development: Government's response to the third report of the culture, media and sport select committee	Department for culture, media and sport (Great Britain)	2002		English
20	The historic environment: a force of our future	Department for culture, media and sport (Great Britain)	2001		English

	City tourism & culture General publications and books	Author	Year	Content	Language
21	Culture and creativity: the next ten years	Department for culture, media and sport (Great Britain)	2001		English
22	Kultur als wirtschaftsfaktor	Deutsch Institut für Wirtschafts-forschung	2002		German
23	Kultur und tourismus in den neuen landern	Dumke, C.	2002		German
24	Making the connections: a practical guide to tourism management in historic towns	English Historic Towns Forum/ English Tourism Council	1999	A discussion of the ideas behind sustainable tourism and the destination life cycle provides a sound basis for action. Thirty case studies give practical examples of making the connections in destinations.	English
25	Getting it right: a guide to visitor management in historic towns	English Tourist Board	1993		English
26	Towards quality urban tourism: integrated quality management (IQM) of urban tourist destinations	Enterprise Directorate General Tourism Unit	2000		English
27	Erfgoed voor toerisme	Erfgoedkoepels op erfgoed en toerisme	2003	Umbrella organizations give their opinion on cultural tourism. They discuss the (im)possibilities of the use of heritage for tourism.	Dutch
28	Residences de tourismes urbaines	Espaces no. 145	1997		French
29	Religious Tourism and Pilgrimage	Fernandes, C. et al	2003		English
30	Market segmentation of an international cultural-historical event in Italy	Fomica, S. and Uysal, M.	1998		English
31	Cultural tourism	Fladmark, J.M.	1994	How important are our cultural assets to tourism? This book explores policy issues in a vitally important area of economic activity. The emphasis is on the multi-faceted and dynamic nature of culture, the mutual dependency of conservation and enterprise, and the need to pursue an integrated approach to policy making.	English

	City tourism & culture General publications and books	Author	Year	Content	Language
32	The rise of the creative class, and how it is transforming work, leisure, community and everyday life	Florida, R.	2002		English
33	Managing heritage tourism: challenges for the management of urban heritage cities and attractions (case study Madrid)	Gonzalez Ortega, M.	2002	This dissertation looks at Madrid and heritage management of the destination and its tourist attractions to analyze what the main challenges are that managers have to face and how they can be overcome.	English
34	Het gedeelde erfgoed	Haan, J. de	1997		Dutch
35	Tourism and gastronomy	Hjalager, A.M. and Richards, G.	2002		English
36	International Cultural Tourism Charter	Icomos	1998		English
37	European outbound city holiday trips (special evaluation of the European Travel Monitor 2002 on behalf of the ETC)	IPK International	2003		English
38	Inventory of cultural tourism resources in the member states	Irish Tourist Board	1988		English
39	Cultuurhistorisch toerisme, erf goed al goed	Janssen, J.	1995	Focuses on project examples regarding culture-historical tourism both locally and regional in the Netherldands and Flanders.	Dutch
40	Cultural tourism: how the arts can help market tourism products: how tourism can help provide markets for the arts	Jones, L.	1992		English
41	Handboek visitor management	LAgroup Leisure & Arts Consulting	1997	Handbook for cities: provides suggestions for a structural approach for visitor management.	Dutch
42	Inventarisatie cultuur-toeristisch beleid	LAgroup Leisure & Arts Consulting	1998	Discusses the cultural tourism policy of the four main cities and the provinces of the Netherlands.	Dutch
43	Urban tourism and its contribution to economic regeneration	Law, Ch.M.	1992		English
44	Tourism and urban revitalization	Law, Ch.M.	1991		English
45	Heritage visitor attraction in Europe	Leask, A. and Yeoman, I.	1999		English

	City tourism & culture General publications and books	Author	Year	Content	Language
46	Market research study: marketing strategies of cultural institutions in Europe	Leipzig Tourist Service	1998		English
47	Tourisme Urbain	Les cahiers espaces no. 3	unknown		French
48	Cultural tourism: new uses for cultural heritage	Maiztegui-Onate, C.	1996		English
49	Cultural tourism: the partnership between tourism and cultural heritage management	McKercher, B. and Cros, H. du	2002	Presents a strong and well argued case for building a vital and productive partnership between two potentially competing interest groups.	English
50	En route pour l'an 2000… ensemble	Mission Paris 2000	1997		French
51	Cultuurtoerisme	Munster, W.	1994		Dutch
52	A culture in common: post 16 education and training committee report	National Assembly for Wales	2001		English
53	Rembrandt-Onderzoek	Nederlands Bureau voor Toerisme (NBT)	1992		Dutch
54	A turizmus mint kulturalis rendszer	Neprajzi Muzeum	2003		Hungarian
55	La demande touristique en espace urbain	Obeservatoire National du Tourisme	1994		French
56	Urban tourism	Page, S.	1995		English
57	Management of historic centres	Pickard, R.	2001	Examines key themes for the management of historic urban centres within a representative sample of centres in different European countries. The twelve historic centres that have been chosen are spread throughout Europe.	English
58	Tourism & heritage attractions	Prentice, R.	1993	Richard Prentice presents a detailed analysis of heritage tourism by understanding the way in which the benefits gained from visits to attractions are received.	English
59	A Turizmus Hatasai	Puczko, L. and Ratz, T.	2002		Hungarian

	City tourism & culture General publications and books	Author	Year	Content	Language
60	Az attrakciótól az élményig	Puczko, L. and Ratz, T.	2002		Hungarian
61	Tourism and cultural change	Robinson, M.	1996		English
62	Tourism and cultural conflicts	Robinson, M. and Boniface, P	1999		English
63	The tourist experience	Ryan, Ch.	2002		English
64	Cultural tourism and business opportunities for museums and heritage sites	Silberberg, T.	1995		English
65	Issues in cultural tourism	Smith, M.K.	2003	Issues in cultural tourism examines the phenomenon of cultural tourism in its broadest sense. Its main focus is the role cultural tourism plays in the globalization process and the impacts of global development on culture, traditions and identity, especially for regional, ethnic and minority groups.	English
66	Verbeelding…versterkt: cultuurtoerisme volgens Toerisme & Recreatie	Toerisme & Recreatie	2000	Inventarization of cultural tourism and problems related to cultural tourism (policy, marketing, finance).	Dutch
67	Valetta tourism: survey	Trevisan, C. Z.	2002		English
68	Medina tourism: survey	Trevisan, C. Z.	2003		English
69	Dissonant heritage: the management of the past as a resource in conflict	Tunbridge, J.E. and Ashworth, G.J.	1996		English
70	Turismo cultural	Turespaña	2001		Spanish
71	Turismo idiomatico	Turespaña	2001		Spanish
72	Plan impulso turismo cultural e idiomatico	Turespaña	2002		Spanish
73	Estratègies de marketing de les institucions culturals europees I la seva relacio ambel turisme verba	Turisme de Barcelona	2000		Catalan
74	Culture, tourism, development: crucial issues for the 21st century	Unesco/AIEST	1996	Outcomes of a round table. Focuses on trends in tourism and its contribution to development, tourism and the preservation of natural and cultural sites, tourism and cultural interaction and the place of culture and development in tourism policies.	English

	City tourism & culture General publications and books	Author	Year	Content	Language
75	Masterplan cultuurhistorisch toerisme	Winkelman & Van Hessen	1989	Proposal for design and implementation of a coherent policy to stimulate culture-historical tourism both to and within the Netherlands.	Dutch
76	Tourism and culture	World Tourism Organization (WTO)	1999		English
77	De economische betekenis van cultuurtoerisme	ZKA beleid en advies	2001		Dutch
78	Het geheim van Holland: vijf jaar pionieren in cultuurhistorisch toerisme	Zuid-Hollands Bureau voor Toerisme	2000		Dutch
	City tourism & culture Publications and books on (cultural) city tourism	**Author**	**Year**	**Content**	**Language**
79	The tourist historic city	Ashworth, G.J. and Tunbridge, J.E.	2000	Develops the concept of the tourist-historic city as a practical means of managing urban places of historical value. Introduces the role of cities in tourism and vice-versa. Presents a framework for analyzing the (tourist) historic city.	English
80	Tourism and cities of art	Borg, J. van den and Gotti, G.	1995	The impact of tourism and visitors flow management in Aix-en-Provence, Amsterdam, Bruges, Florence, Oxford, Salzburg and Venice.	English
81	Tourism management in heritage cities: proceedings of the international seminar	Borg, J. van den and Russo, A.P.	1999		English
82	Urban tourism: the visitor economy and the growth of large cities	Christopher, M.	2002		English
83	Traditional tourism cities: problems and perspectives	Costa, P. et al	1993	Describes the process of local tourism development, the life-cycle theory of tourism development. Also deals with the benefits and the costs of local tourism development and different concepts of the carrying capacity are introduced.	English
84	Les loisirs dans la ville	Espaces no. 107	1991		French

	City tourism & culture Publications and books on (cultural) city tourism	Author	Year	Content	Language
85	Tourism in major cities	Law, Ch.M.	1996	In the last twenty years visiting large cities for short breaks has become a popular form of tourism, affecting capital, historic and even historic cities. The aim of this book is to examine and evaluate this phenomenon using national casestudies.	English
86	Tourism and the environment: visitor impact management and cultural heritage	Borg, J. van der, et al	1993	The focus of the study is on approaches to carrying capacity and visitor management in small and medium size towns and cities in Europe.	English
87	International city tourism: analysis & strategy	Maier, G. et al	1997	This book provides the student and professional with a guide to marketing international city tourism. It explores the use of databases, analyzing demand and competitive pressures, enabling students and professionals to get to grips with the key elements.	English
88	Organizing sustainable tourism development in heritage cities	Russo, A.P.	1998	This paper represents an investigation on the desirable features that a "cultural tourism industry" should possess to be consistent with an idea of sustainable tourism development.	English
89	Comment renforcer l'offre culturelle des villes	Sports loisirs Tourisme - No. 202	1995		French
90	Travel & Tourism Intelligence (TTI) City Reports	Travel and Tourism Intelligence (TTI)	Yearly		English
91	Planning considerations for cultural tourism: a case study of four European cities			This paper discusses and tests a framework of reference for visitor-friendliness, a complex concept that encapsulates the main dimensions of the urban tourism product such as its quality, accessibility and image projection.	

	City tourism & culture Specific publications and books on cities	Author	Year	Content	Language
92	L'accueil de jeunes touristes a Bruxelles	CHAB	1992		French
93	Bruxelles est devenue plus chère que New York	Couvreur, D.	1994		French
94	Tourisme à Bruxelles	Februtour	1982		French
95	Renovation des espaces publics à Bruxelles	Fondation Roi Baudouin	unknown		French
96	Bruxelles est malade. Mais son coeur bat	Michiels, M.	1996		French
97	Livre blanc du tourisme Bruxellois	Pillen, P.	1994		French
98	Evaluatie Brugge 2002	WES Onderzoek en advies	2004		Dutch
99	Urban tourism: attracting visitors to large cities	Law, Ch.M.	1993	This text examines the ways in which tourism can be used as a means of generating income for large cities, showing how it can lead to jobs, income and a move to environmental refurbishment. Using examples from Europe and North America, it focuses on the challenges facing older industrial cities.	English
100	Urban tourism: performance and strategies in eight European cities	Berg, L. et al	1996	In tourism there is a shift towards more active, cultural holidays. The attractiveness of urban culture and most other aspects of city life receive growing attention from tourists. EURICUR has investigated the role and function of tourism in eight European cities: Antwerp, Copenhagen, Edinburgh, Genua, Glasgow, Hamburg, Lyon and Rotterdam.	English
101	Art of regeneration: urban renewal through cultural activity	Comedia	1996	Charles Landry and François Matarasso from Comedia summarize recent experiences of arts programmes in British cities.	English
102	Euro Fête au Pays de Liège	Euro Fête au Pays de Liège	2001		French
103	Paris 2000: une occasion des ambitions	Marie de Paris	1999		French
104	London cultural capital: realizing the potential of a world-class city	Mayor of London	2003		English

	City tourism & culture Specific publications and books on cities	Author	Year	Content	Language
105	Rotterdam and Porto cultural capitals of Europe	Richards, G. et al	2002	This report considers the cultural, social and economic effects of the Rotterdam and Porto Cultural Capital Events in 2001. The research shows that while some of the event aims were met, the longer term impacts are more difficult to measure.	English
106	Survey of foreign visitors to Tallinn 2002 and 2003	Tallinn City Tourist office	quarterly		Estonian
107	Impacto turistico de la capitalidad europea cultural (caso Salamanca 2002)	Turespaña	2003		Spanish
108	City tourism 2002: proceedings of European Cities Tourism's International Conference in Vienna, Austria	Wöber, K. W.			English
109	European City Benchmark: Study: Wonderful Copenhagen	Sager, C.	2003		English

	City tourism & culture Publications and books specific for countries	Author	Year	Content	Language
110	Culture as commodity?: the economics of the arts and built heritages in the UK	Casey, B. et al	1996	This comprehensive study examines support for the cultural sector from public, private and voluntary sources, and charts its distribution throughout the UK. It looks in detail at employment and audiences across the sector, and consumer expenditure.	English
111	Local cultural strategies: draft guidance for local authorities in England	Department for culture, media and sport (Great Britain)	1999		English
112	Cultural tourism and museums & galleries in the UK	Marcon, G.	2002		English
113	Urban tourism in the UK	Marketscape	2003		English
114	The UK cultural sector: profile and policy issues	Selwood, S.	2001		English
115	The European market for UK city breaks	Trew, T. and Cockerell, N.	2002		English

	City tourism & culture Publications and books specific for countries	Author	Year	Content	Language
116	Urbaner tourismus Schweiz	Basel Economics Ltd. (BAK)	2001		German
117	Estonia tourism 1999-2002: overview of the main source markets	Estonia Tourist Board	2002		English
118	Culture, tourism and development: the case of Ireland	Kockel, U.	1994		English
119	The strategic development of heritage tourism: the Dutch approach	Munster, W.	1996	Given the richly built heritage of the Netherlands the growth of cultural tourism has to be considered as an opportunity for the Dutch tourism industry. The main recommendation of this plan is to bring history to life by means of a dynamic and coherent presentation of the built heritage.	English
120	Culture & tourism in Scotland: case studies	Scottish Executive	2000		English
121	Inner city ethnoscapes and cultural tourism: lessons learned from Canada and the UK	Shaw, S.	2003		English
122	Tourism in Cottenera	Trevisan, C. Z.	2002		English

	City tourism & culture Publications and general books for Europe	Author	Year	Content	Language
123	Market for cultural tourism in Europe	Bywater, M.	1993		English
124	Planning cultural tourism in Europe	Dodd, D.	1999	The contributors to this book reflect on the problems of cooperation, the problems of learning each other's language, with emphasis on planning for cultural tourists, accessibility and new technologies.	English
125	Capitales Baltes	Guide Autrement, le	2000 1995		French German
126	Art cities in Europe	Institut für bidungsreisen (IFB)			
127	The image of Europe in North America	Menlo Consulting Group	2003		English

	City tourism & culture Publications and general books for Europe	Author	Year	Content	Language
128	European cities and capitals of Europe	Palmer, R.	2004		English
129	Today's youth travellers: tomorrow's global nomads	Richards, G. & Wilson, J.	2003		English
130	Heritage visitor attraction in Europe: a visitor profile	Richards, G.	1999	Culture and heritage are increasingly important raw materials for the visitor industry. The ATLAS research indicates that the cultural product itself is not enough to satisfy most visitors.	English
131	Development and evolution of cultural tourism in Europe	Richards, G.	2000		English
132	Cultural tourism in Europe	Richards, G.	1996	This book draws on the data collected by the ATLAS cultural tourism project and combines data presentation and analysis with more reflective discussions on the nature of cultural tourism in different areas of Europe.	English
133	Cultural attractions and European tourism	Richards, G.	2001	This book reviews the cultural tourism market in Europe from a survey carried out in 1997. It analyzes the way in which cultural attractions are produced and used by cultural tourists, and how cultural attractions such as museums, art galleries, monuments and heritage attractions are marketed.	English
134	Marketing cultural tourism in Europe	Richards, G., Bonnik, C.	1995		English

	City tourism & culture Articles	Author	Year	Language
1	Nieuwe musea in de stad: tussen kunst en kitsch	Aalst, I. van	1999: no. 8-9	Dutch
2	Le tourisme culturel en Europe: vaut le détour	Autissier, A.M	1997: no. 8	French
3	Culture year cash warning	Wither, M.	2003: November 10	English
4	Cultural and heritage tourism: identifying niches for international travelers	Azula et al	1998: no. 9	English
5	Cultural tourism: economic success at the expense of culture?	Bendixen, P.	1997: no. 4	English
6	Tourism in European capital cities	Borg, J van der, et al	1996: no. 23	English
7	Demand for city tourism in Europe	Borg, J van der	1994: no.21	English
8	Demand for city tourism in Europe: tour operator's catalogues	Borg, J. van den	1994: no. 15	English
9	Tourism in European heritage cities	Borg, J. et al	1996: no. 23	English
10	Understanding urban tourism: London in the early 1990's	Bull, P. and Church, A.	2001: vol.3 no.2	English
11	Urban heritage tourism: the global local nexus	Chang, T.C. et al	1996: no.2	English
12	Conceptualizing the latent visitor to heritage attractions	Davies, A. and Prentice, R.	1995: no. 16	English
13	De kracht van cultuur: UNESCO als hoeder van het erfgoed	Ex, N.	2004: March 5	Dutch
14	Where to now for arts tourism?	Evans, M.	1999 vol. 8	English
15	Tourism in captial cities	Hall, M.C.	2002: vol 50, no. 3	English
16	Heritage places, leisure and tourism	Herbert, D.T.	1995	English
17	Establishing the common ground: tourism, ordinary places, grey areas and environmental quality in Edinburgh, Scotland	Howie, F.	2000	English
18	Culture and tourism: a framework for further analysis	Hughes, H.L.	2002:no. 7	English
19	Market based product development in heritage tourism	Light, D. and Prentice, R. C.	1994: no. 15	English
20	The new resorts for the 21st century?	Middleton, V.T.C.	1999: vol.10	English
21	Arts and tourism National Coordinator, STB	Munro. H.	1997	English
22	Cultuur en toerisme: strategische alliantie of monsterverbond?	Munster, W.	1996: no. 6, vol. 11	Dutch
23	Exploring the dialectics of route-based tourism: the Camino de Santiago	Murray, M. and Graham, B.	1997: no. 2	English
24	An integrative framework for urban tourism research	Pearce, D.G.	2001: vol.28, no.4	English

	City tourism & culture Articles	Author	Year	Language
25	The Guggenheim-Bilbao museum effect: a reply to Maria V. Gomez	Plaza, B.	1999: no. 23	English
26	Analysis of cultural sights attractiveness for tourism	Polacek, M. and Aroch, R.	1984: no. 4	English
27	Festivals as creative destination	Prentice, R. and Andersen, V.	2003: no. 1	English
28	Culture, identity and tourism representation: marketing Cymru or Wales?	Pritchard, A. and Morgan, N.J.	2001: vol.22, no.2	English
29	Amsterdam as a tourist destination	Dahles, H.	1998: no.1	English
30	Production and consumption of European cultural tourism	Richards, G. no. 2	1996: vol. 23,	English
31	Tourism attraction systems: exploring cultural behaviour	Richards, G.	2000:vol. 25, no. 2	English
32	Demand evolution in cultural tourism	Richards, G.	2001: no. 24	English
33	World culture and heritage and tourism	Richards, G.	2000: vol. 25, no. 1	English
34	Developments in European cultural tourism	Richards, G.	2002: vol. 50, no. 3	English
35	The European cultural capital event: strategic weapon in cultural arms race?	Richards, G.	2000: no. 6	English
36	Cultuurtoeristische vraag neemt in snel tempo toe: ruim 25 miljoen cultuurtoeristische bezoeken in EU	Richards, G. and Bonnik, C.A.M.	1994: no. 4	Dutch
37	Planning considerations for cultural tourism: a case study of four European cities	Russo, A.P. and Borg, J. van der	2002: vol 23, no. 6	English
38	Improving visitor care and heritage attractions	Schouten, F.	1995	English
39	Creativity and conflict: cultural tourism in London's city fringe	Shaw, S.J. and Macleaod, N.E.	2000	English
40	Cultuurtoerisme: confectie of maatwerk	Terpstra, R.	1997: vol. 18, no. 21	Dutch
41	Visitor management in heritage cities	unknown	1994: vol. 15, no. 5	English
42	Cultuurtoerisme niet verkeerd voor staatskas: toerist rijp voor cultuur	Wiedijk, F.M.	1995: no. 3	Dutch
43	Arts and heritage tourism	Zeppel, H. and Hall, C.M.	1992	English

	City tourism & culture Presentations	Author	Year	Language
1	International City Tourism Conference: future trends in European city breaks: the tour operator perspective	Arroyabe, J.A. (Managing Director Mundicolor Holidays UK)	unknown	English
2	Changing values of new generations: old cities for new customers needs	Bordas, E. (President THR, International Tourism Consultants)	unknown	English
3	Metropolis 2002 - an outlook on global city break trends	Freitag, R. (IPK)	unknown	English
4	Culture as the tourist product, tourism and culture: towards the 21st century.	Robinson, M. et al	1996	English
5	Tourism and cultural change: tourism and culture: towards the 21st century.	Robinson, M. et al	1996	English
6	Managing cultural resources for the tourist. Tourism and culture: towards the 21st century	Robinson, M. et al	1996	English
7	The Thomson future holiday forum	Thomson, TUI		English
8	The assessment and evaluation of marketing strategies city tourism managers	Wöber, K. (Institute for Tourism and Leisure Studies)	2002	English

Appendix 3

Participants in the Roundtable Workshops

For this study three roundtable workshops were organized. The first workshop was held in Barcelona, Spain, on November 1, 2003. The following persons participated in this roundtable workshop:

- Mr. J.J. Tresseras of Iberturs in Barcelona
- Mr. J. Franquesa of the Universidad d'Illas Baleares of Mallorca
- Ms. Ch. Panyidou of the Tourism and Hotel School
- Mr. C. Fernandes of the Polytechnic Institute of Viana do Castelo, Portugal
- Mr. J. Wilson of the Universita Rovira I Virgili in Tarragona.

The second workshop was held in Amsterdam, The Netherlands, on March 17, 2004. The following persons participated this roundtable workshop:

- Mr. H. Dominicus, Director Marketing and Communications of the Amsterdam Tourist and Convention Bureau in Amsterdam
- Mr. A. Gorissen, Manager Uitmarkt at the Amsterdam Uitburo (ticket and information service) in Amsterdam
- Mr. C. van Lent, Account Manager cultural history at the tourist office of Zuid-Holland, in Delft
- Mr. P. Vigeveno, Director of Voyage & Culture (outgoing tour operator) in Amsterdam.

In addition to these participants, representatives of the national tourist organizations in France, Belgium, England and Scotland were invited. Unfortunately they all declined the invitation or cancelled the meeting.

The third workshop was held in Vienna (Austria), on March 25, 2004. The following persons participated in this roundtable workshop:

- Mr. M. Draxler, Manager of Projects and Events, City of Vienna Marketing Services Ltd in Vienna
- Ms. C. Haustein, Manager Marketing & Communication, Museums Quartier Errichtungs- und BetriebsgesmbH in Vienna
- Mr. W.J. Kraus Director of the Vienna Tourist Board in Vienna
- Mr. W. Lackner, General Manager Incoming of Mondial Destination Management, Vienna
- Mr. F. Patay, General Secretary of Mozart 250 in Vienna 2006
- Mr. L. Puczkó, Manager with KMPG Advisory Services, Travel Leisure and Tourism group CEE, Budapest, Hungary
- Ms. R. Rosendorf, Marketing Researcher of the Austrian National Tourist Organization in Vienna
- Mr. M. Schachner, Senior Lecturer in Tourism Management of IMC University of applied sciences in Krems, Austria.

Apart from the roundtable workshops, the following persons were interviewed:

- Mr. K. Wöber, associate professor of the Institute for Tourism and Leisure Studies, Vienna University of Economic and Business Administration in Vienna, Austria
- Mr. T. Berckmoes, Cultuurnet Vlaanderen, Brussels, Belgium.

Appendix 4

Research Method and Response

The qualitative market(ing) research (primary data collection) consisted of two main instruments, namely an internet poll and the roundtable workshops. This appendix focuses on the research method and response regarding the internet poll.

For this qualitative research LAgroup contacted the 33 members of the European Travel Commission (ETC). The ETC members are the National Tourism Organizations (NTO) of the following countries:

- Austria
- Belgium
- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Iceland
- Ireland
- Italy
- Latvia
- Lithuania
- Luxemburg
- Malta
- Monaco
- The Netherlands
- Norway
- Poland
- Portugal
- Romania
- Slovak Republic
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- United Kingdom

In a letter, which was sent to the NTO's in December 2003, the members were asked to provide lagroup with a selection of 8 to 10 names and email addresses of relevant stakeholders in the field of city tourism and culture in the member country. Twenty-one NTO's responded to this information request and provided LAgroup with a total of 436 names and addresses. Seventy-four questionnaires were returned, which is a **response rate of 17%**. Table 1 shows the countries that have responded, the number of questionnaires that were sent to each country and the response per country. European City Tourism (ECT) and the Netherlands Board of Tourism and conventions offices in America and Japan helped to send out extra questionnaires to stakeholders.

The fieldwork regarding the internet poll was carried out between February 10, 2004, when the first questionnaires were sent out, and April 10, 2004. The questionnaires have been analyzed using a qualitative approach, based on the assumption that the outcome is indicative for the issues and related opinions among stakeholders within Europe. The responses are, however, not representative for Europe or for any of these countries individually.

Table 1 Response for the internet poll: number of questionnaires sent and received

Country	Number of questionnaires received	Number of questionnaires sent	Response rate %
France	5	6	83
Austria	5	9	56
Finland	4	11	36
Netherlands	10	29	34
Hungary	3	9	33
Poland	3	9	33
Malta	2	7	29
Latvia	3	12	25
Belgium	6	29	21
Sweden	2	10	20
Spain	5	27	19
Norway	1	8	13
Germany	3	27	11
Estonia	1	10	10
Switzerland	4	44	9
Czech Republic	1	11	9
Slovenia	1	12	8
Great Britain	8	97	8
Other (America)	1	35	3
Bulgaria	1	0	0
Italy	1	0	0
Other (Japan)	4	0	0
Greece	0	17	0
Ireland	0	6	0
Luxembourg	0	0	0
Cyprus	0	11	0
Lithuania	0	0	0
Croatia	0	0	0
Denmark	0	0	0
Iceland	0	0	0
Ireland	0	0	0
Monaco	0	0	0
Portugal	0	0	0
Romania	0	0	0
Slovakia	0	0	0
Turkey	0	0	0
Total	74	436	17

Note: questionnaires were only sent to stakeholders for whom an email address was provided by a National Tourist Organization

Appendix 5

Questionnaire

Internet Poll City Tourism and Culture

Dear Sir, Madam,

Recently LAgroup *Leisure & Arts Consulting* (based in Amsterdam) and Interarts Foundation, (based in Barcelona) have been assigned a research project into city tourism and culture by the European Travel Commission (ETC). The main goal of the study is to '*draw up a conceptual framework that can be used by the ETC and member countries with regard to the marketing and product development for city tourism with a cultural motive'*. The study focuses on cultural tourism to villages, towns, cities and metropolises.

One part of the study that we are carrying out concerns problems and solutions and opportunities and threats related to city tourism and culture. We have therefore contacted the National Tourist Organizations in the 33 member countries in Europe asking them to provide us with names of stakeholders active in the field of city tourism and culture in their own countries. **They have provided us with your name and email address**.

We hope that you are able to assist us with the following questionnaire concerning **city tourism and culture**. Your answers will be treated with the highest confidentiality.

Should you have any questions regarding the questionnaire or the study, please feel free to contact us. We look forward to receiving your reply and greatly appreciate your assistance.

Sincerely,

Stephen Hodes (Director)

For questions please contact:
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Questionnaire: City tourism and culture

We are delighted that you are willing to fill out this questionnaire. We would very much appreciate if you could return this questionnaire to us by the end of March 2004.

Part I Background information

1.1 Could you please provide us with the following information:

Name of the organization	
Your name	
Position	
Type of organization	
Country	
Email address	

Part II Area of interest and expertise

2.1 Do you organize tours within Europe?

- ❒ No (please continue with question 2.4)
- ❒ Yes

2.2 Approximately what percentage of these tours does city cultural tourism play a role?

	%

2.3 What percentage of the tours you organize are individual tours and what percentage is for groups?

Group tours	%
Individual tours	%
Total	**100 %**

2.4 Could you please indicate which of the following areas are your **main** area(s) of expertise? (more than one answer possible)

- ❒ Domestic cultural city tourism (i.e. for the country in which I am located)
- ❒ Cultural tourism in Southern Europe (among which Cyprus, France, Greece, Malta, Spain, Turkey)
- ❒ Cultural tourism in North-West Europe (Austria, Belgium, Finland, Germany, Great Britain, Ireland, and Norway)
- ❒ Cultural tourism in Eastern Europe (Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, and Poland)
- ❒ Cultural city tourism for all of Europe

2.5 Please indicate which main area of interest you will be filling in the following questionnaire (only one answer possible)

- ❒ Domestic cultural city tourism (i.e. for the country in which I am located)
- ❒ Cultural tourism in Southern Europe (among which Cyprus, France, Greece, Malta, Spain, Turkey)
- ❒ Cultural tourism in North-West Europe (Austria, Belgium, Finland, Germany, Great Britain, Iceland, Ireland, and Norway)
- ❒ Cultural tourism in Eastern Europe (Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, and Poland)
- ❒ Cultural city tourism for all of Europe

Part III General statements for cultural city tourism

3.1 Will European cities face an increasing or a decreasing demand for cultural tourism from the following continents in the next five to ten years?

Source market	**Increasing demand**	**Decreasing demand**	**Demand will remain the same**
Asia	❒	❒	❒
South America	❒	❒	❒
North America	❒	❒	❒
Africa	❒	❒	❒
Australia/New Zealand	❒	❒	❒

3.2 Will cultural tourism between cities within Europe face an *increasing or a decreasing* demand for cultural tourism?

- ❒ increasing demand
- ❒ decreasing demand
- ❒ demand will remain the same

3.3 Please fill out the following questions as far as possible from the point of view of your primary area of expertise. (If you accidentally tick a different box, tick the correct box and your previous answer will disappear)

		Disagree totally	Disagree	Neutral	Agree	Agree totally	No opinion
	Trends and Developments						
1	Cultural tourism to European cities is at the beginning of its lifecycle	❒	❒	❒	❒	❒	❒
2	Cultural tourism to European cities is in the mature phase of its lifecycle	❒	❒	❒	❒	❒	❒
3	Cultural city tourism in Europe is traditional rather than innovative	❒	❒	❒	❒	❒	❒
4	Cultural tourism to cities in Europe is a high income generator for these cities	❒	❒	❒	❒	❒	❒
5	The share of independent cultural city tourists (versus organized groups) will increase in the coming 5 to 10 years	❒	❒	❒	❒	❒	❒
	(City) Marketing & Promotion						
1	Places in Europe are increasingly using cultural tourism to promote themselves	❒	❒	❒	❒	❒	❒
2	Most historic places promote their destinations effectively	❒	❒	❒	❒	❒	❒
3	Without culture cities are no interesting destinations to visit	❒	❒	❒	❒	❒	❒
4	Many places are increasingly adding new cultural facilities to make themselves more attractive to foreign visitors	❒	❒	❒	❒	❒	❒
5	Culture will become less and less a distinctive element in city marketing	❒	❒	❒	❒	❒	❒
6	Being a European Cultural Capital has no long term effect on the number of visitors to the city	❒	❒	❒	❒	❒	❒
7	Cultural diversity (in ethnic terms) in many European cities is an under-utilized aspect in the marketing and promotion of these cities	❒	❒	❒	❒	❒	❒
8	There is a high discrepancy between quality criteria used in marketing and promotion of the cultural sector as opposed to the tourist sector	❒	❒	❒	❒	❒	❒
9	Marketing a place as a cultural destination is highly effective, as it significantly increases the number of visitors	❒	❒	❒	❒	❒	❒

		Disagree totally	Disagree	Neutral	Agree	Agree totally	No opinion
10	Places themselves have little influence on whether they are promoted as a cultural destination or not, as this is often a national political choice	❐	❐	❐	❐	❐	❐
11	Cultural city tourism offers an interesting opportunity for shoulder and low season tourism	❐	❐	❐	❐	❐	❐
12	In order to be able to promote itself successfully as a cultural destination a place needs to have a landmark that attracts visitors	❐	❐	❐	❐	❐	❐
13	Certain cultural places should realize that 'enough is enough': attracting more people would be damaging for these places	❐	❐	❐	❐	❐	❐
14	Some historic places are better off keeping their cultural product a well kept secret	❐	❐	❐	❐	❐	❐
	Distribution						
1	In 10 years time the cultural tourist will almost exclusively book their trip via the Internet	❐	❐	❐	❐	❐	❐
2	Cultural tourists rarely gather information from a tourist office prior to departure and/or in the place itself	❐	❐	❐	❐	❐	❐
3	Cultural tourists will make less and less use of intermediaries (travel agents, tour operators, tourist offices) when booking their trips	❐	❐	❐	❐	❐	❐
	Target groups and behaviour						
1	Cultural destinations do not have sufficient insights in the needs of cultural tourists regarding decision making processes	❐	❐	❐	❐	❐	❐
2	Cultural tourists will increasingly want to visit those places and sites that are unique and different (less visited by other tourists)	❐	❐	❐	❐	❐	❐
3	Cultural tourists are generally better able to find their own way around compared to other tourists	❐	❐	❐	❐	❐	❐

		Disagree totally	Disagree	Neutral	Agree	Agree totally	No opinion
4	Cultural organizations are generally still too much focused on their own product/service, rather than on the needs of their visitors	❒	❒	❒	❒	❒	❒
5	The cultural tourist does not want to be treated as a tourist, but as a local	❒	❒	❒	❒	❒	❒
6	Compared to other tourists, cultural tourists tend to book later	❒	❒	❒	❒	❒	❒
7	Cultural tourists are less money conscious than other types of leisure tourists	❒	❒	❒	❒	❒	❒
	The cultural product						
1	The increasing commercialization of culture makes it less attractive to visitors	❒	❒	❒	❒	❒	❒
2	Cultural festivals and events are important reasons for cultural tourists to choose to specifically visit a place	❒	❒	❒	❒	❒	❒
3	Due to scaling-up and global brands (i.e. Guggenheim, travelling mega exhibitions) places are losing their cultural uniqueness	❒	❒	❒	❒	❒	❒
4	The North American cultural tourist is interested in European culture as a whole and not in individual regions/cities	❒	❒	❒	❒	❒	❒
5	The Asian cultural tourist is interested in European culture as a whole and not in individual regions/cities	❒	❒	❒	❒	❒	❒
6	Increased interest in cultural tourism is a threat to the conservation of cultural heritage	❒	❒	❒	❒	❒	❒
7	Villages and small towns are reliant on incoming tour operators for their cultural tourists	❒	❒	❒	❒	❒	❒
8	Historic villages and small towns rely economically to a great degree on incoming cultural tourism	❒	❒	❒	❒	❒	❒

		Disagree totally	Disagree	Neutral	Agree	Agree totally	No opinion
	Competition						
1	Competition between cities in the area of cultural tourism will increase considerably over the next 5 to 10 years	❐	❐	❐	❐	❐	❐
2	European cities as cultural destinations will experience increasing competition from cities in Asia, north and south America	❐	❐	❐	❐	❐	❐
	Partnerships						
1	There is a clear need for sharing knowledge (problems and solutions) between cultural destinations	❐	❐	❐	❐	❐	❐
2	Public/private partnerships offer interesting developments for cultural tourism	❐	❐	❐	❐	❐	❐
3	Cooperation between cultural organizations and tourist organizations is difficult, as they do not speak the same language	❐	❐	❐	❐	❐	❐

3.4 In which of the following types of places are foreign cultural tourists **mainly** interested?

❐ Villages and small towns (such as Arles, Assisi, Auvers-sur-Oise, Avila, Delft, Fontainebleau, Windsor, etc.)

❐ Large towns and cities (such as Cannes, Glasgow, Gothenburg, Krakow, Ljubljana, Nice, Oberhausen, Porto, Pisa, Salzburg, Seville, etc.)

❐ Large cities and metropolises (i.e. Amsterdam, Barcelona, Berlin, Budapest, Istanbul, London, Paris, Rome, etc.)

Part IV Opportunities and threats

4.1 What are the three most important market related **opportunities** you see for cultural city tourism **in your area(s) of expertise**? Could you indicate for which type of places these opportunities are most important?

	Most important to:
Opportunity 1:	❒ villages and small towns ❒ large towns and cities ❒ large cities and metropolis
Opportunity 2:	❒ villages and small towns ❒ large towns and cities ❒ large cities and metropolis
Opportunity 3:	❒ villages and small towns ❒ large towns and cities ❒ large cities and metropolis

4.2 What are the three most important market related **threats** you see for cultural city tourism **in your area(s) of expertise?** Could you indicate for which type of places these threats are most important?

	Most important to:
Threat 1:	❒ villages and small towns ❒ large towns and cities ❒ large cities and metropolis
Threat 2:	❒ villages and small towns ❒ large towns and cities ❒ large cities and metropolis
Threat 3:	❒ villages and small towns ❒ large towns and cities ❒ large cities and metropolis

Part V Finally

5.1 Finally, could you please indicate below how many years of experience you have in the field of cultural tourism?

❒ < 1 year

❒ 1-3 years

❒ 4-5 years

❒ 6-10 years

❒ >10 years

5.2 Do you have any comments and/or suggestions? You may also fill in additional problems, solutions or ideas.

THANK YOU VERY MUCH FOR THE TIME YOU TOOK TO FILL IN THIS QUESTIONNAIRE!

Appendix 6

Results of the Questionnaire

In total, 74 completed questionnaires were returned. This appendix lists the results per question. The questionnaire was divided in four parts:

1. Background information of the respondents;
2. Area of interest and expertise of the respondents;
3. General statements for cultural city tourism;
4. Opportunities and threats for cultural city tourism.

Part I: Background information

The respondents were asked for some background information, involving:

- The country that they live in;
- The type of organization that they work for;
- The position they hold;
- The years of experience they have in the field of cultural tourism.

Table 2 Country of origin

	Frequency	Valid Percentage
Netherlands	10	13.5
Great Britain	8	10.8
Belgium	6	8.1
Austria	5	6.8
France	5	6.8
Spain	5	6.8
Finland	4	5.4
Switzerland	4	5.4
Germany	3	4.1
Hungary	3	4.1
Latvia	3	4.1
Poland	3	4.1
Japan	3	4.1
Malta	2	2.7
Sweden	2	2.7
Bulgaria	1	1.4
Czech Republic	1	1.4
Estonia	1	1.4
Ireland	1	1.4
Italy	1	1.4
Norway	1	1.4
Slovenia	1	1.4
USA	1	1.4
Total	**74**	**100.0**

The figure above shows that most respondents were Dutch. The reason for the high response rate from Dutch people could be as a result of the questionnaire being sent out in The Netherlands. The relatively high number of respondents from Great Britain is a result of the high amount of questionnaires that were sent out in the country. Due to the number of questionnaires returned it has not been possible to compare the results of individual regions within Europe.

Table 3 Type of organization

	Frequency	Valid Percentage
Tourist organization		
Local tourist office	16	21.6
National tourist board	11	14.9
	27	
Supplying organization		
Incoming tour operator	8	10.8
Destination/visitor management	5	6.8
Outgoing tour operator	4	5.4
Cultural organization	3	4.1
Airline	2	2.7
Bus/coach operator	1	1.4
Congress organizer	1	1.4
Hotel operator	1	1.4
Sightseeing	1	1.4
	26	
Other type of organization		
Research institute	6	8.1
Educational organization	4	5.4
Consultancy	4	5.4
City Council	1	1.4
NA	1	1.4
Other	5	6.8
	21	
Total	**74**	**100.0**

The National Tourist Organizations were asked to provide LAgroup with the contact details of stakeholders. This request resulted in a relatively high number of names and addresses of (local) tourist offices and tourist boards. This is most likely the reason why the respondents largely represent these types of organizations. Compared to cultural organizations, tourist organizations are also more likely to feel connected to the subject(s) in the questionnaire. The organization types mentioned under 'other' were:

- Destination Management Organization;
- Media;
- International Organization;
- Professional Organization;
- National Agency for Management of Museums and Heritage Sites.

The types of organizations were divided in two main groups, namely *tourist organizations* and *supply organizations*. Organizations that did not belong to either of these are mentioned under 'other' types of organizations. In addition to the overall analysis of the 74 respondents, the outcomes of the questionnaire were compared for the two main types of organizations. Where applicable, indications of differences in opinions and outcomes are mentioned.

Due to the low number of questionnaires received from cultural organizations, it has not been possible to compare the results of cultural and tourist organizations.

Table 4 Position of respondent

	Frequency	Valid Percentage
General Manager/Director	28	37,8
Head of Department	12	16,2
Marketing Manager	12	16,2
Professor/ Lecturer/ Researcher	5	6,8
Executive	2	2,7
Assistant Manager	2	2,7
Unknown	2	2,7
Other	11	14,9
Total	**74**	**100**

The positions mentioned under 'other' were:

- Tourism Officer;
- Vice President;
- Journalist;
- Senior Press Officer;
- Senior Consultant;
- Former Director of Local Tourist office;
- Product Manager;
- Researcher;
- Webmaster;
- Travel Planning;
- Incoming and Incentive.

The majority of the respondents (48) had more than 5 years experience in the field of cultural tourism, of whom 31 had more than 10 years of experience.

Part II: Area of interest and expertise

Regarding the organization that the respondent works for, the respondents were asked:

- Whether the organization organizes tours within Europe or not;
  - If yes, in approximately what percentage of these tours does city cultural tourism play a role;
  - If yes, what percentage of the tours you organize are for individuals and what percentage are for groups.

The respondents were also asked for their main area(s) of experience and asked to indicate for which area of expertise the questionnaire was filled in.

One in four of the respondents - 18 in total - were tour operators. Nearly all (14) tour operators organized more than 50% cultural city trips and only 4 tour operators, organized less than 50%. Seven tour operators organized cultural city trips only. One third of the tour operators organized group tours only and two tour operators organized more than 50% of individual tours.

Table 5 Main area of expertise (more than one answer possible)

	Frequency	Valid Percentage
Domestic	55	74.3
Southern Europe	15	20.3
Northern Europe	19	25.7
Eastern Europe	10	13.5
All Europe	20	27.0
Total	**119**	

Table 6 Area of expertise used to fill in questionnaire

	Frequency	Valid Percentage
Domestic	40	54.1
Southern Europe	5	6.8
North-West Europe	10	13.5
Eastern Europe	2	2.7
All Europe	17	23.0
Total	**74**	**100**

Part III: General statements for cultural city tourism

Table 7 Expected demand for cultural tourism from the continents (in percentage)

	Asia	South America	North America	Africa	Australia/ New Zealand
Increasing	86.5	40.5	39.2	24.3	43.2
Remain same	4.1	48.6	33.8	54.1	41.9
Decreasing	2.7	2.7	18.9	10.8	5.4
NA	6.8	8.1	8.1	10.8	9.5
Total	**100**	**100**	**100**	**100**	**100**

Most of the respondents agreed on the increasing demand for cultural tourism from Asia (86.5%). Nearly half of the respondents expected the demand to remain the same from South America. For North America the opinions varied: nearly one in five respondents expected a (further) decrease in demand. For Africa and for Australia/New Zealand the respondents mainly expected the demand to remain the same or to increase. For all continents, except Asia, the tourist organizations seemed more convinced than the *supplying organizations* (see Table 3) that the demand would remain the same.

Table 8 Demand for cultural tourism within Europe

	Frequency	Valid Percentage
Increasing	65	87.8
Decreasing	1	1.4
Remain same	6	8.1
NA	2	2.7
Total	**74**	**100**

Table 9 Main interest of cultural tourists

	Frequency	Valid Percentage
Villages / small towns	7	9.5
Towns / cities	16	21.6
Cities / metropolis	50	67.6
All types of places	1	1.4
Total	**74**	**100**

Table 10 Statements on trends and developments (in percentage)

	Trends & developments	Totally disagree (1.0)	Disagree (2.0)	Neutral (3.0)	Agree (4.0)	Totally agree (5.0)	No opinion	NA	Total	Average (1-5)
1	Cultural tourism to European cities is at the begining of its lifecycle	12.2	48.6	12.2	18.9	6.8	1.4	0.0	100	2.6
2	Cultural tourism to European cities is at the mature phase of its lifecycle	4.1	31.1	14.9	43.2	2.7	2.7	1.4	100	3.1
3	Cultural city tourism in Europe is traditional rather than innovative	0.0	24.3	8.1	56.8	10.8	0.0	0.0	100	3.5
4	Cultural tourism to cities in Europe is a high income generator	0.0	4.1	5.4	59.5	28.4	2.7	0.0	100	4.2
5	The share of independent cultural city tourists (versus organized groups) will increase in the coming 5 to 10 years	0.0	1.4	13.5	47.3	36.5	1.4	0.0	100	4.2

Regarding the first statement for trends and developments, over 60% of the respondents (totally) disagreed. This was stronger for tourist organizations than for the supplying organizations. Overall, the respondents showed the highest level of agreement regarding the (fourth) statement suggesting that cultural tourism to cities in Europe is a high-income generator for these cities.

Table 11 Statements on marketing (in percentage)

		Totally disagree (1.0)	Disagree (2.0)	Neutral (3.0)	Agree (4.0)	Totally agree (5.0)	No opinion	NA	Total	Average (1-5)
	Marketing									
1	Places in Europe are increasingly using cultural tourism to promote themselves	0.0	0.0	5.4	63.5	29.7	1.4	0.0	100	4.2
2	Most historic places promote their destinations effectively	2.7	43.2	21.6	28.4	2.7	1.4	0.0	100	2.8
3	Without culture cities are not interesting destinations to visit	5.4	45.9	12.2	28.4	6.8	0.0	1.4	100	2.9
4	Many places are increasingly adding new cultural facilities to make themselves more attractive to foreign visitors	0.0	5.4	13.5	59.5	20.3	1.4	0.0	100	4.0
5	Culture will become less and less a distinctive element in city marketing	10.8	48.6	12.2	20.3	8.1	0.0	0.0	100	2.7
6	Being a European Cultural Capital has no long term effect on the number of visitors to the city	4.1	43.2	21.6	25.7	1.4	4.1	0.0	100	2.8
7	Cultural diversity (in ethnic terms) in many European cities is an underutilised aspect in the marketing and promotion of these cities	1.4	6.8	21.6	55.4	8.1	5.4	1.4	100	3.7
8	There is a high discrepancy between quality criteria used in marketing and promotion of the cultural sector as opposed to the tourist sector	0.0	16.2	27.0	31.1	14.9	10.8	0.0	100	3.5
9	Marketing a place as a cultural destination is highly effective, as it significantly increases the number of visitors	1.4	5.4	17.6	62.2	12.2	1.4	0.0	100	3.8
10	Places themselves have little influence on whether they are promoted as a cultural destination or not; this is often a national political choice	8.1	62.2	13.5	8.1	2.7	4.1	1.4	100	2.3
11	Cultural tourism offers an interesting opportunity for shoulder and low season tourism	0.0	4.1	4.1	48.6	41.9	1.4	0.0	100	4.3
12	In order to be able to promote itself successfully as a cultural destination a place needs to have a landmark that attracts visitors	0.0	16.2	14.9	44.6	21.6	1.4	1.4	100	3.7
13	Certain cultural places should realize that 'enough is enough': attracting more people would be damaging for these places	2.7	10.8	16.2	48.6	17.6	4.1	0.0	100	3.7
14	Some historic places are better off keeping their cultural product a well kept secret	10.8	40.5	24.3	13.5	5.4	5.4	0.0	100	2.6

Regarding the marketing of cultural tourism destinations, the respondents showed the highest level of agreement on ‘cultural tourism offers an interesting opportunity for shoulder and low season tourism’ (statement eleven). The strongest disagreement existed regarding the last statement (statement fourteen), which argues that some historic places are better off keeping their cultural product a well-kept secret. Neither of these two questions showed a difference in opinion between the tourism and the supply organizations.

The second statement of the above list (most historic places promote their destinations effectively) showed a difference between the tourism and the supply organization: the tourism organizations seemed to disagree more than the supply organizations.

Statement ten showed a difference in opinion between the two main types of organizations: more tourism organizations than supply organizations disagreed that places themselves have little influence on whether they are promoted as a cultural destination or not.

Table 12 Statements on distribution (in percentage)

		Totally disagree (1.0)	Disagree (2.0)	Neutral (3.0)	Agree (4.0)	Totally agree (5.0)	No opinion	NA	Total	Average (1-5)
	Distribution									
1	In 10 years time cultural tourists will almost exclusively book their trips via the Internet	5.4	25.7	21.6	35.1	8.1	1.4	2.7	100	3.2
2	Cultural tourists rarely gather information from a tourist office prior to departure and/or in the place itself	4.1	56.8	13.5	18.9	2.7	1.4	2.7	100	2.6
3	Cultural tourists will make less and less use of intermediaries when organizing and booking their trips	2.7	17.6	23.0	47.3	6.8	0.0	2.7	100	3.4

Although the respondents generally agree that cultural tourists do gather information prior to departure and/or in the location (statement two), the majority of the opinions are that the role of intermediaries will diminish. The opinion as to the use of the Internet is less crystallized with a small majority believing that tourists will almost always book using the Internet.

Table 13 Statements on target groups (in percentage)

	Target group	Totally disagree (1.0)	Disagree (2.0)	Neutral (3.0)	Agree (4.0)	Totally agree (5.0)	No opinion	NA	Total	Average (1-5)
1	Cultural destinations do not have sufficient insights into the needs and decision making process of cultural tourists	0.0	16.2	18.9	45.9	16.2	1.4	1.4	100	3.6
2	Cultural tourists will increasingly want to visit those places and sites that are unique and different: less visited by other tourists	0.0	14.9	12.2	50.0	21.6	0.0	1.4	100	3.8
3	Cultural tourist are generally better able to find their own way around compared to other tourists	0.0	16.2	18.9	56.8	5.4	1.4	1.4	100	3.5
4	Cultural organizations are generally too much focused on their own product/service, rather than on the needs of their visitors	0.0	8.1	20.3	45.9	23.0	1.4	1.4	100	3.9
5	The cultural tourist does not want to be treated as a tourist, but more as a (temporary) local inhabitant	1.4	17.6	27.0	36.5	12.2	4.1	1.4	100	3.4
6	Compared to other tourists, cultural tourists tend to book later	2.7	27.0	35.1	16.2	4.1	13.5	1.4	100	2.9
7	Cultural tourists are less money conscious than other types of leisure tourists	2.7	25.7	24.3	35.1	4.1	6.8	1.4	100	3.1

Table 14 Statements on culture (in percentage)

		Totally disagree (1.0)	Disagree (2.0)	Neutral (3.0)	Agree (4.0)	Totally agree (5.0)	No opinion	NA	Total	Average (1-5)
	Cultural									
1	The increasing commercialization of culture makes it less attractive to visitors	2.7	45.9	16.2	31.1	1.4	1.4	1.4	100	2.8
2	Cultural festivals and events are important reasons for cultural tourists to choose to specifically visit a place	0.0	4.1	5.4	66.2	21.6	1.4	1.4	100	4.1
3	Due to scaling-up and global brands (i.e. Gugenheim, travelling mega exhibitions) places are losing their cultural uniqueness	4.1	43.2	16.2	29.7	1.4	1.4	4.1	100	2.8
4	The North American cultural tourist is more interested in European culture as a whole and less in individual regions/ countries	2.7	36.5	16.2	29.7	5.4	6.8	2.7	100	3.0
5	The Asian cultural tourist is more interested in European culture as a whole and less in individual regions/ countries	0.0	25.7	16.2	39.2	5.4	10.8	2.7	100	3.3
6	Increased interest in cultural tourism is a threat to the conservation of cultural heritage	12.2	44.6	13.5	24.3	4.1	0.0	1.4	100	2.6
7	Villages and small towns are reliant on incoming tour operators for their cultural tourists	1.4	27.0	28.4	28.4	2.7	9.5	2.7	100	3.0
8	Historic villages and small towns rely economically to a great extent on incoming cultural tourism	1.4	12.2	20.3	50.0	2.7	10.8	2.7	100	3.5

Although more than 50% of the respondents disagreed on the statement that an increased interest in cultural tourism is a threat to the conservation of cultural heritage (statement six), this seems to be more likely for the tourism organizations than for the supplying organizations.

Table 15 Statements on competition (in percentage)

		Totally disagree (1.0)	Disagree (2.0)	Neutral (3.0)	Agree (4.0)	Totally agree (5.0)	No opinion	NA	Total	Average (1-5)
	Competition									
1	Competition between cities in Europe in the area of cultural tourism will increase considerably over the next 5 to 10 years	0.0	4.1	6.8	54.1	32.4	0.0	2.7	100	4.2
2	European cities as cultural destinations will experience increasing competition from cities in Asia, north and/or south America	2.7	23.0	14.9	39.2	16.2	0.0	4.1	100	3.5

The tourism organizations nearly all agreed that cities within Europe will face increasing competition in the area of cultural city tourism (statement one).

Table 16 Statements on partnerships (in percentage)

		Totally disagree (1.0)	Disagree (2.0)	Neutral (3.0)	Agree (4.0)	Totally agree (5.0)	No opinion	NA	Total	Average (1-5)
	Competition									
1	There is a clear need for sharing knowledge (data, problems and solutions, etc) between cultural destinations	0.0	0.0	6.8	50.0	37.8	4.1	1.4	100	4.3
2	Public/private partnerships offer interesting development opportunities for cultural tourism	0.0	1.4	2.7	50.0	41.9	2.7	1.4	100	4.4
3	Cooperation between cultural organizations and tourism organizations is difficult, as they often do not speak the same language	2.7	16.2	13.5	51.4	14.9	0.0	1.4	100	3.6

The respondents agreed that there is a need for cooperation, sharing knowledge and even for partnerships. These statements did not show differences between tourism organizations and supplying organizations.

Part IV: Opportunities and threats

The last section of the questionnaire focused on opportunities and threats. The respondents were asked to mention 'the three most important market related opportunities and the three most important threats for cultural city tourism in the selected area of expertise'. The respondents were also asked to indicate for which type of places these opportunities and threats were most important. These have been incorporated in the text of this study.

Quality

Generally for all types of places, respondents feared a decreasing level of quality: both the quality of the artistic level (too many offers) and also the quality of services and products offered in the places. Festivals and events are running out of steam and are taken for granted too much. This last development is certainly true for products and services, which results in loss of quality and becoming one of many. Lack of money was mentioned as a specific threat for towns and villages, due to decreasing subsidies, the small towns and villages run out of financial resources to promote and maintain heritages. Accessibility was also mentioned as a specific threat for villages and towns: the number of visitors is still growing, also for heritage sites and the smaller places will become overcrowded. Marketing was also mentioned as a specific threat for villages, towns and small cities; these types of places lack a coherent focus or a single vision; good culture products are poorly marketed, or in some cases totally lack promotion.

Disasters

Finally, all kinds of disasters were regarded as important threats: firstly, terrorism was mentioned by the respondents. Secondly, the threat of political instability was mentioned, which relates to a third threat, namely the possibility for economic recession. Finally, diseases (SARS), natural catastrophes, and increased criminality were mentioned.

Appendix 7

Cultural Capitals over the Years

Since 1985:

1985	Athens
1986	Florence
1987	Amsterdam
1988	Berlin
1989	Paris
1990	Glasgow
1991	Dublin
1992	Madrid
1993	Antwerp
1994	Lisbon
1995	Luxembourg
1996	Copenhagen
1997	Thessaloniki
1998	Stockholm
1999	Weimar
2000	Avignon, Bergen, Bologna, Brussels, Helsinki, Cracow, Reykjavik, Prague, Santiago de Compostella
2001	Porto, Rotterdam
2002	Bruges, Salamanca
2003	Graz
2004	Genova, Lille

Over the next few years:

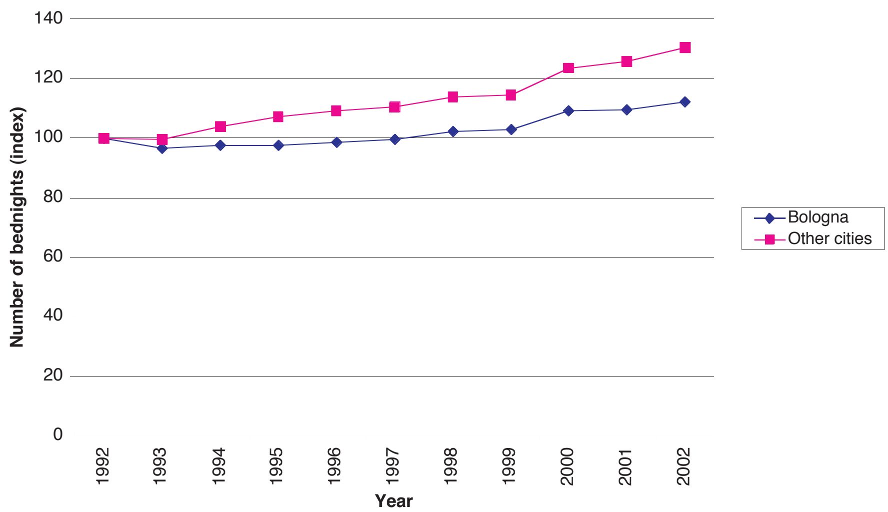
2005	Cork
2006	Patras
2007	Luxembourg, Sibiu
2008	Liverpool, Stavanger

Appendix 8

TourMIS Data:
Bednights in Cultural Capitals

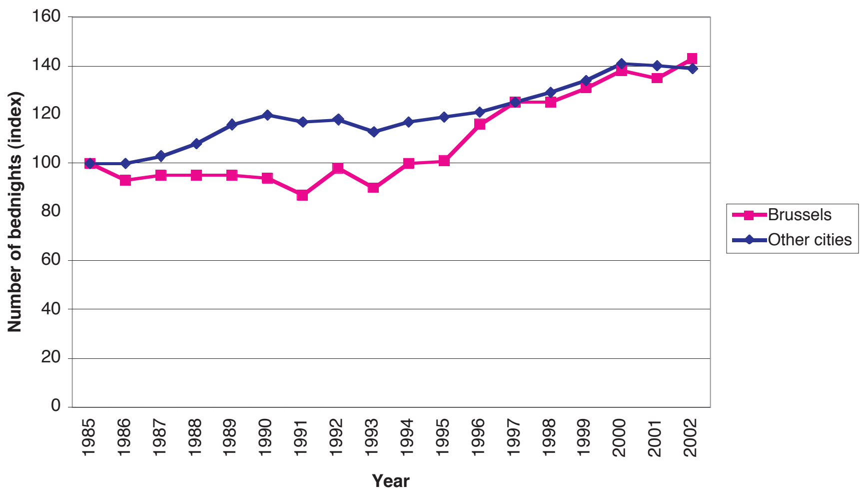
This appendix shows the number of overnight stays for various Cultural Capitals. The year that the city was Cultural Capital is stated above the graph and each graph shows the development of overnight stays for one Cultural Capital and the average for 'other cities'. 'Other cities' is the average of all other cities in this appendix. The Cultural Capitals in this appendix are Bologna, Brussels, Glasgow, Helsinki, Lisbon and Weimar.

Bologna Cultural Capital 2000

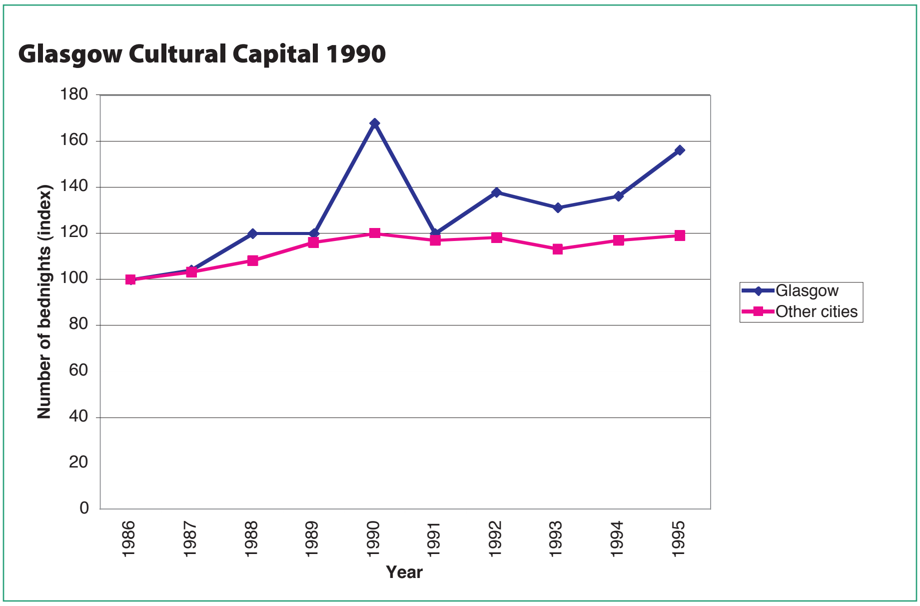


Source: TourMIS

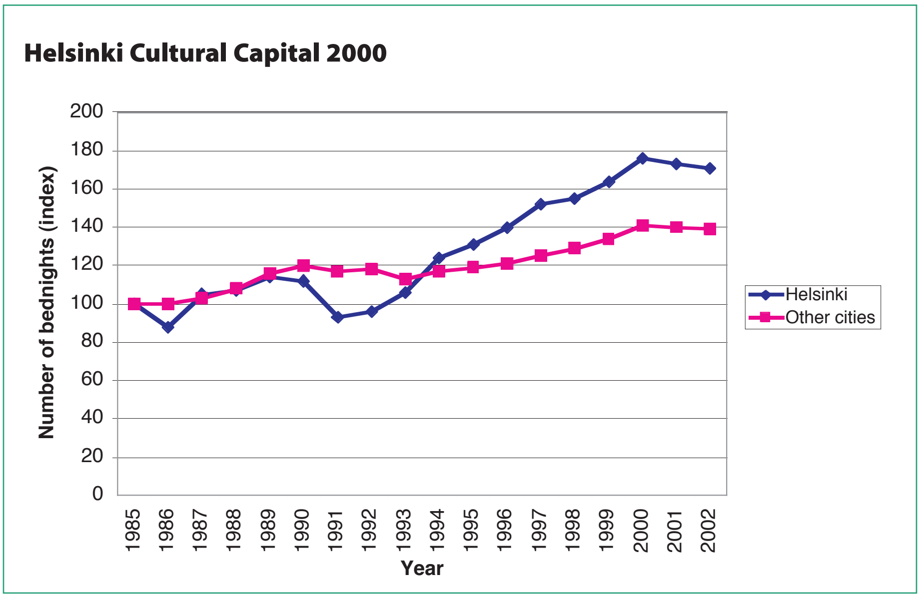
Brussels Cultural Capital 2000



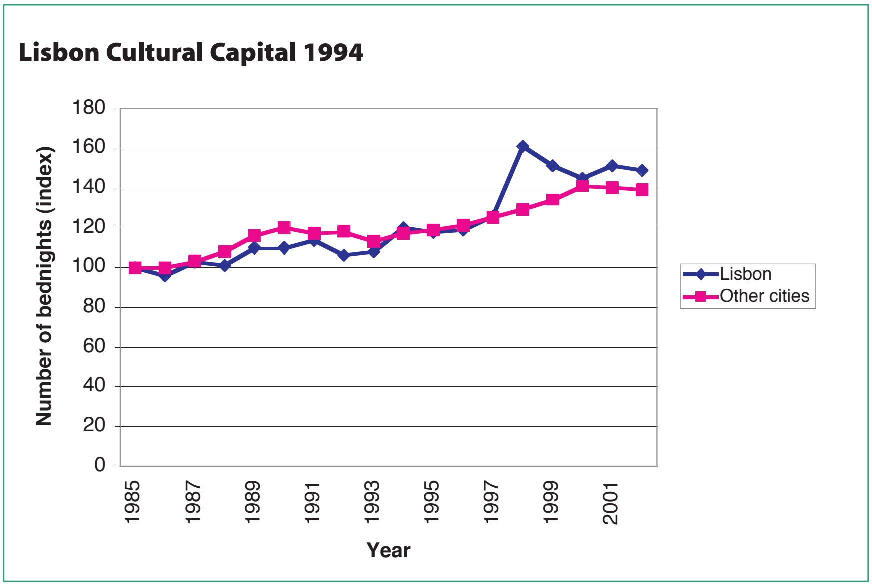
Source: TourMIS



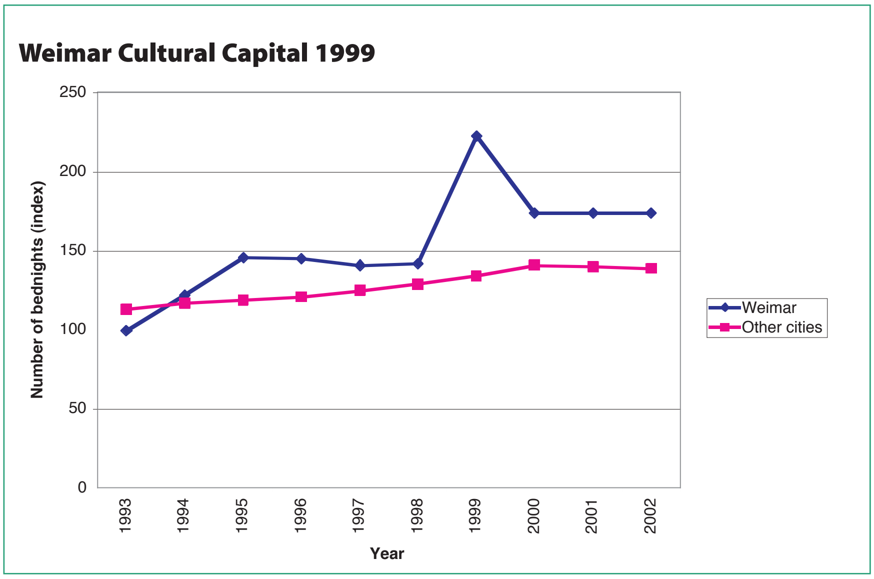
Source: TourMIS



Source: TourMIS



Note: 1998 was the year of the EXPO 98
Source: TourMIS

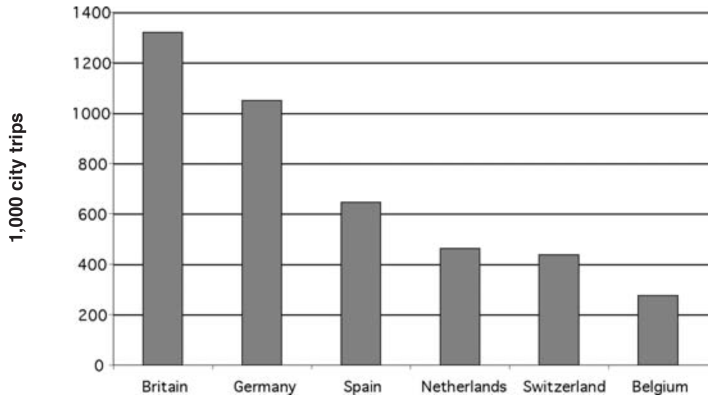


Source: TourMIS

Appendix 9

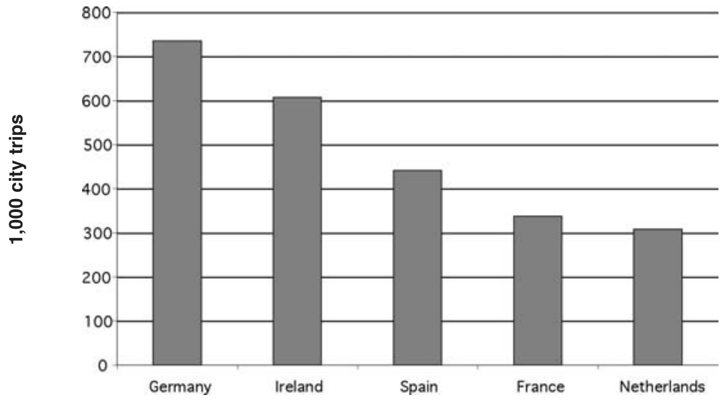
IPK International Data: Inbound by Origin (2002)

France, major inbound source markets (2002)

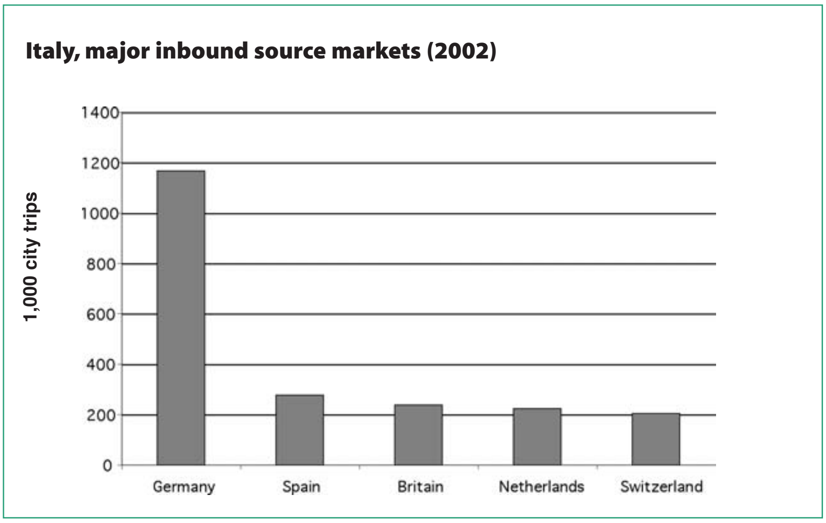


Source: IPK International

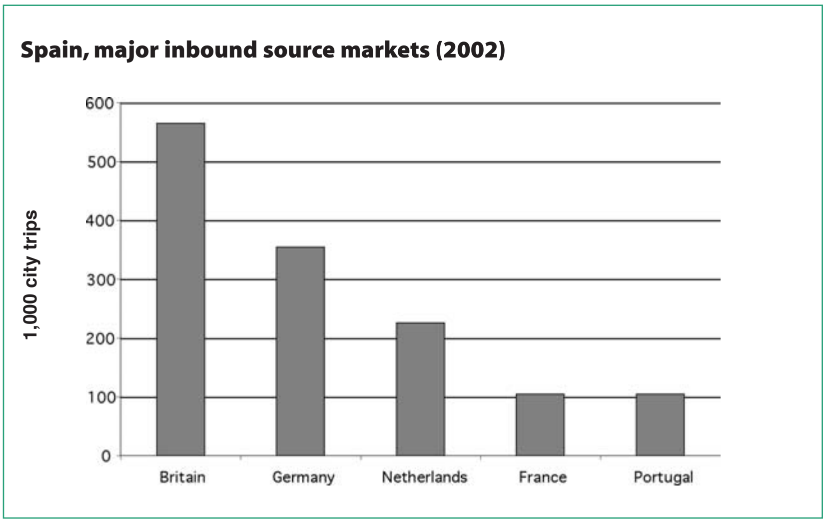
Great Britain, major inbound source markets (2002)



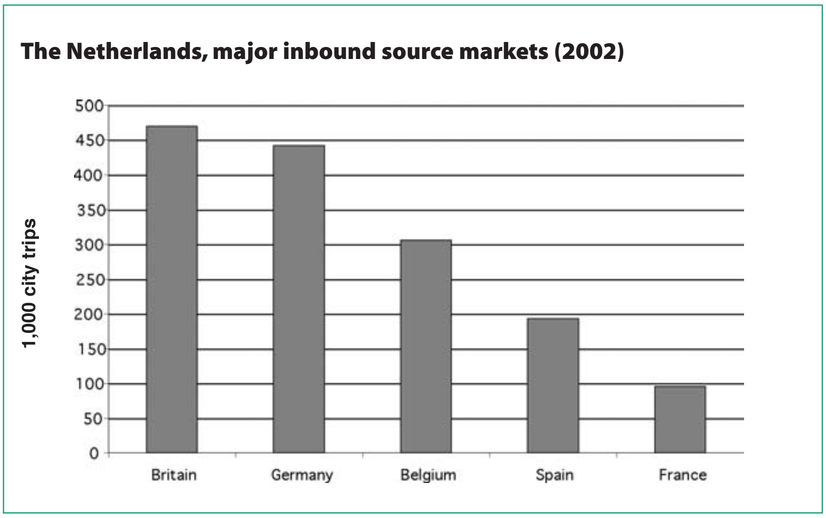
Source: IPK International



Source: IPK International



Source: IPK International



Source: IPK International

Appendix 10

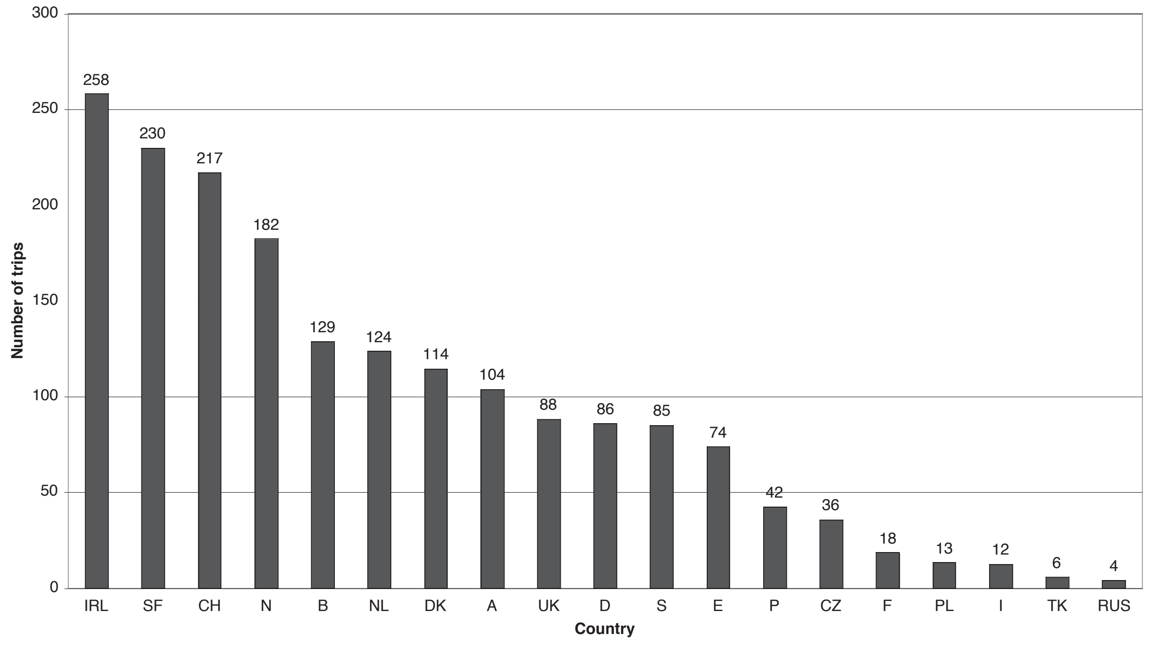
IPK International Data: City Holiday Trips, Destinations and Countries of Origin (2002)

Destinations	Origin Countries																					
	All City Trips	D	UK	E	NL	CH	B	SF	RUS	F	IRL	A	N	S	I	DK	PL	P	TK	CZ	CR	Others
France (F)	5197	1050	1319	645	463	437	276	29	29	-	54	64	66	48	99	76	59	154	23	39	*	265
Great Britain (UK)	3481	735	-	441	308	151	173	38	*	337	607	94	127	122	78	115	24	31	5	*	*	91
Germany (D)	3113	-	241	208	279	386	176	36	95	51	9	182	39	150	151	135	225	*	162	169	144	273
Italy (I)	2970	1167	239	277	224	204	92	37	38	86	16	186	49	30	-	40	8	67	*	10	71	129
Spain (E)	1780	354	565	-	226	67	57	50	10	104	15	14	45	9	85	27	*	104	*	*	*	46
Netherlands (NL)	1760	442	470	193	-	59	306	7	*	96	36	14	14	23	20	5	*	*	*	27	*	45
Austria (A)	1480	799	20	144	52	60	26	39	*	15	*	-	8	*	102	5	37	*	*	46	25	100
Belgium (B)	1202	338	275	61	282	10	-	*	*	144	39	*	*	*	8	18	8	*	*	*	*	8
USA	1074	93	471	109	40	68	11	9	*	8	72	15	35	29	28	23	16	*	7	*	*	36
Czech Republic (CZ)	910	306	115	105	51	21	13	11	13	*	11	51	15	22	17	24	19	*	*	-	*	114
Ireland (IRL)	904	61	687	24	24	5	72	13	*	*	-	*	5	*	*	*	*	*	*	*	*	11
Russia (RUS)	788	77	22	*	11	*	*	73	-	*	*	6	6	*	*	*	18	*	*	*	*	573
Hungary (HU)	736	179	19	89	38	8	*	48	*	12	22	42	10	40	*	11	43	*	*	*	38	135
Sweden (S)	734	139	50	14	10	12	*	232	69	*	*	17	133	-	*	15	*	*	*	*	*	40
Denmark (DK)	604	98	40	12	14	30	*	15	*	*	*	25	175	145	6	-	*	15	17	*	*	8
Poland (PL)	549	83	11	*	15	*	12	*	147	*	12	29	*	31	23	9	-	*	*	14	*	162
Switzerland (CH)	520	302	28	15	18	-	*	5	18	31	*	39	*	*	22	*	*	*	*	*	8	34
Portugal (P)	490	32	65	283	27	9	*	12	*	9	*	14	5	5	19	6	*	-	*	*	*	*
Turkey (TK)	458	170	31	25	32	6	59	*	15	*	*	13	*	12	*	7	15	*	-	*	*	71
Finland (SF)	231	67	45	*	*	10	*	-	64	*	*	*	24	8	*	*	*	*	*	*	*	10
Greece (GR)	226	34	50	30	*	13	*	5	*	*	*	8	*	*	*	5	*	*	10	*	*	63
Canada (CAN)	190	27	107	*	9	11	*	*	*	23	*	*	*	*	*	*	*	*	*	*	*	10
Others	3642	441	393	372	84	69	40	528	609	166	25	80	61	71	72	100	30	42	148	54	36	221
Total outbound	**32097**	**6994**	**5143**	**2894**	**1956**	**1511**	**1302**	**1167**	**1106**	**1066**	**922**	**831**	**789**	**745**	**714**	**595**	**509**	**423**	**377**	**364**	**321**	**2368**
Share %	**100**	**22**	**16**	**9**	**6**	**5**	**4**	**4**	**3**	**3**	**3**	**3**	**2**	**2**	**2**	**2**	**2**	**1**	**1**	**1**	**1**	**7**

Source: IPK International

Appendix 11

IPK International Data: Outbound City Holiday Trips

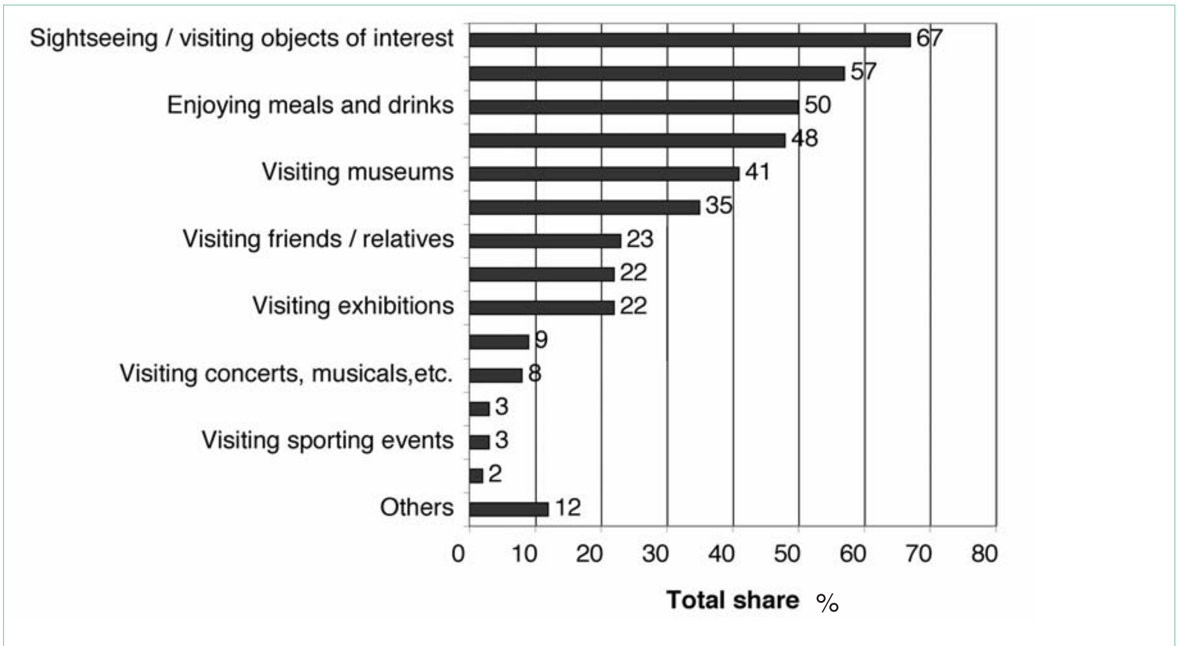


per 1,000 inhabitants

IRL = Ireland, SF = Finland, CH = Switzerland, N = Norway, B = Belgium, NL = Netherlands, DK = Denmark, A = Austria, UK = United Kingdom, D = Denmark, S = Sweden, E = Spain, P = Portugal, CZ = Czech Republic, F = France, PL = Poland, I = Italy, TK = Turkey and RUS = Russia

Source: IPK International

IPK International Data: Activities in City Trips

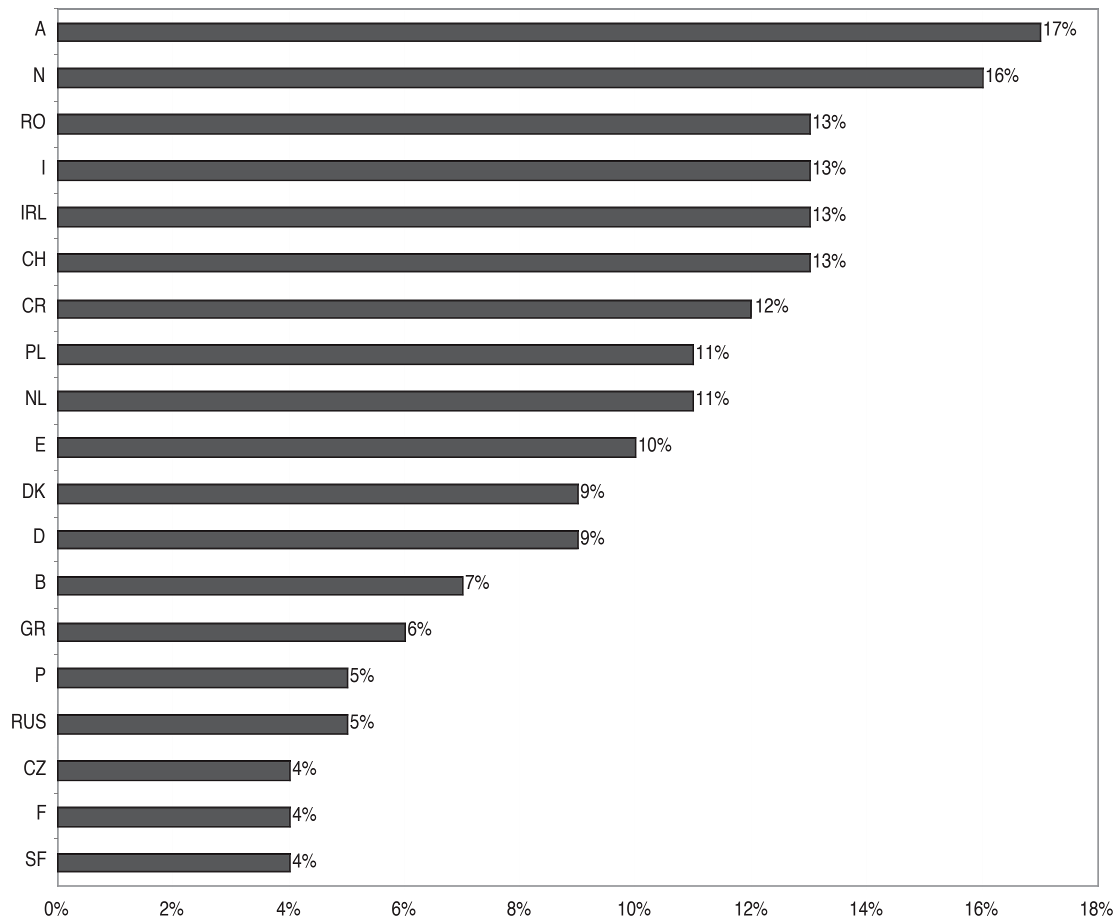


Source: IPK International

Appendix 13

IPK International Data: Theatre, Museum Visits and Sightseeing (2002)

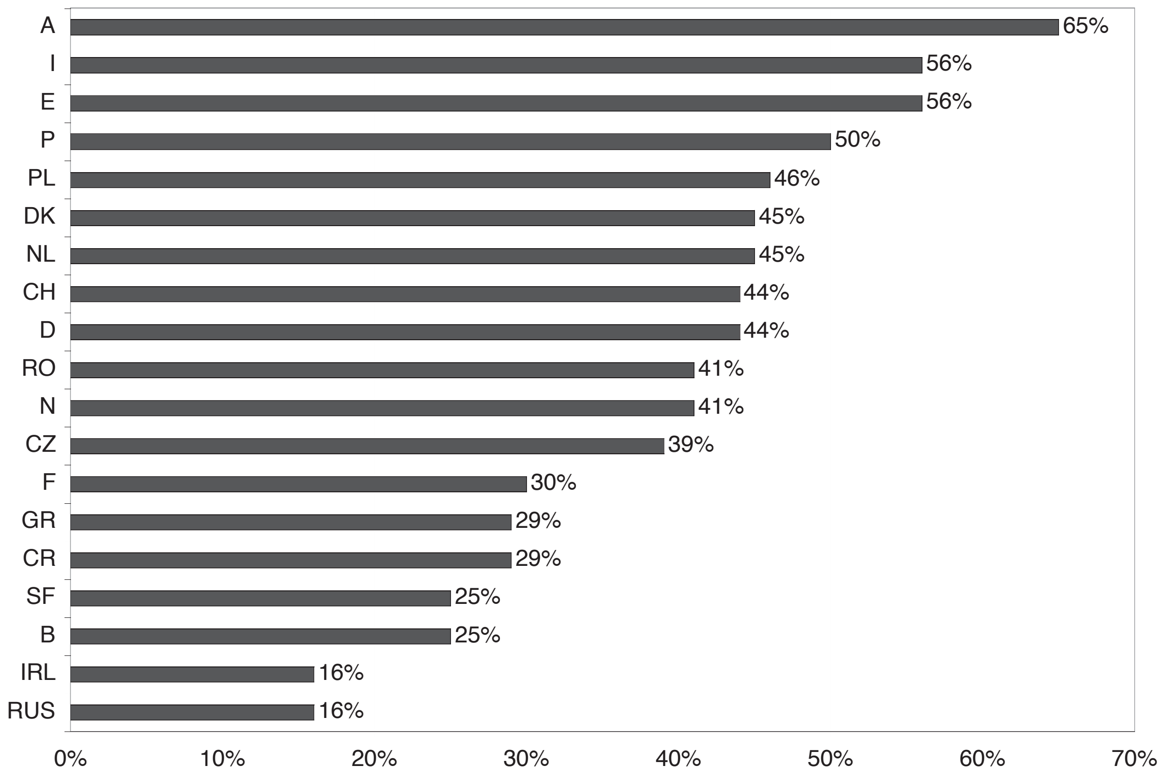
Theatre visits



A = Austria, N = Norway, RO = Romania, I = Italy, IRL = Ireland, CH = Switzerland, CR = Croatia, PL = Poland, NL = Netherlands, E = Spain, DK = Denmark, B = Belgium, GR = Greece, P = Portugal, RUS = Russia, CZ = Czech Republic, F = France, SF = Finland

Source: IPK International

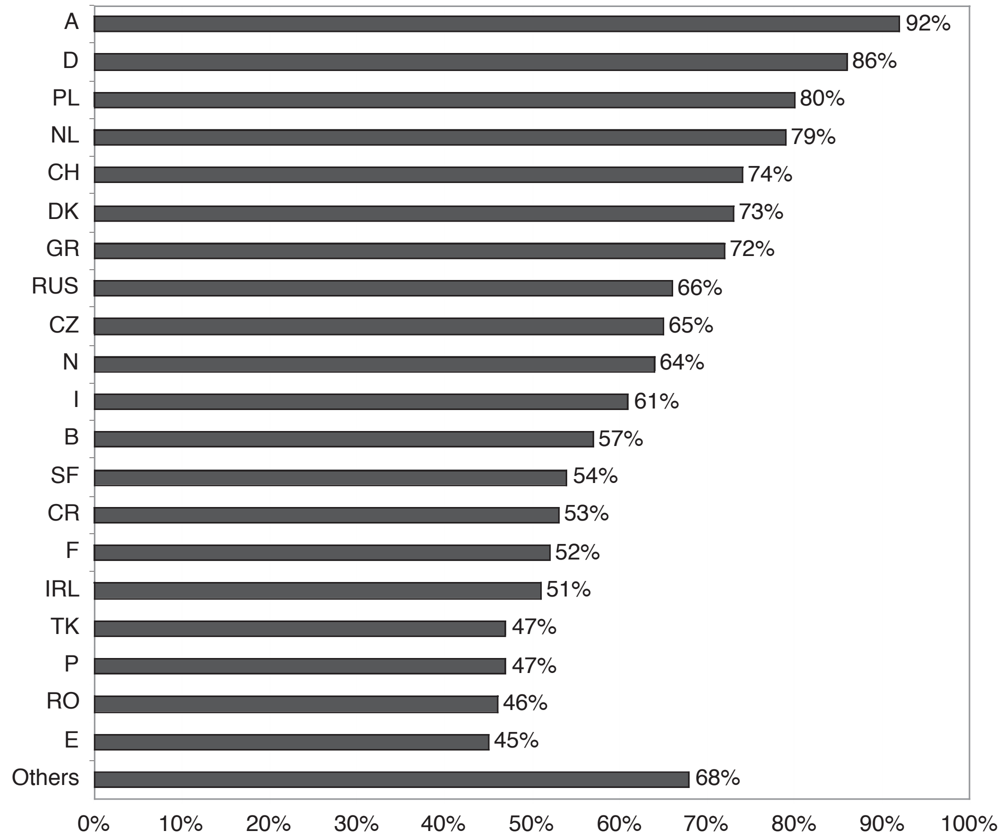
Museum visits



A = Austria, I = Italy, E = Spain, P = Portugal, PL = Poland, DK = Denmark, NL = Netherlands, CH = Switzerland, D = Germany, RO = Romania, N = Norway, CZ = Czech Republic, F = France, GR = Greece, CR = Croatia, SF = Finland, B = Belgium, IRL = Ireland, RUS = Russia

Source: IPK International

Sightseeing / objects of interest



A = Austria, D = Germany, PL = Poland, NL = Netherlands, CH = Switzerland, DK = Denmark, GR = Greece, RUS = Russia, CZ = Czech Republic, N = Norway, I = Italy, B = Belgium, SF = Finland, CR = Croatia, F = France, IRL = Ireland, TK = Turkey, P = Portugal, RO = Romania, E = Spain

Source: IPK International

Appendix 14

Definitions of Cultural Tourism

Below are number of definitions of cultural tourism used by different organizations.

1. All movements of persons might be included in the definition because they satisfy the human need for diversity, tending to raise the cultural level of the individual and giving rise to new knowledge, experience and encounters. (broad definition).
   Source: World Travel Organization

2. Movements of persons for essentially cultural motivations such as study tours, performing arts and cultural tours, travel to festivals and other cultural events, visits to sites and monuments. (narrow definition).
   Source: World Travel Organization

3. All aspects of travel, whereby travellers learn about the history and heritage of others or about their contemporary ways of life or thought.
   Source: McIntosh and Goeldner

4. Any form of tourism to another place that involves the visitor experiencing all of the 'cultural' aspects about that place, its contemporary lifestyles, food, topography, environment, towns and villages, just as much its historic sites and cultural performances.
   Source: ICOMOS

5. Visits by persons from outside the host community motivated wholly or in part by interest in the historical artistic, scientific or lifestyle/heritage offerings of a community, region, group or institution.
   Source: Silbergs

6. Visitors attendance at one or more of the following cultural attractions:

   · Festivals or fairs (music, dance, comedy visual arts, multi-arts and heritage);

   · Performing arts or concerts (theatre, opera, ballet, and classical and contemporary music);

   · Museums or art galleries;

   · Historic or heritage buildings, sites, monuments;

   · Art or craft workshops or studios;

   · Aboriginal sites and cultural displays.

   Source: Department of Culture and the Arts, Government of Western Australia in Journey Further, an A*rts & Cultural Tourism Strategy for Western Australia 2004-2008*

7. Within Victoria, cultural tourism includes experiences such as:
   - Walking though Melbourne's laneways and precincts;
   - Visiting Ballarat, Bendigo and/or Castlemaine to learn about the Australian Gold Rush;
   - Meeting with local people and being part of community festivals;
   - Attending the Port Fairy Folk Festival;
   - Visiting one of the National Trust's historical sites;
   - Enjoying Victoria's rich multicultural offerings e.g. enjoying the Italian atmosphere of Lygon Street;
   - Visiting Aboriginal sites in the Grampians or the Mildura Murray Outback;
   - Visiting artists working in their studios or art galleries;
   - Attending a theatre performance at one of Melbourne's theatres;
   - Enjoying steam travel e.g. train and paddle boat experiences.

   Source: website of Tourism Victoria in Australia, Victoria's Arts, Theatres & Cultural Heritage Plan 2002 - 2006

8. Cultural tourism is based on the mosaic of places, traditions, art forms, celebrations and experiences that portray this nation and its people, reflecting the diversity and character of the United States. Travellers who engage in cultural tourism activities visit the following:
   - Historic sites;
   - Art galleries, theatre and museums;
   - Cultural events, festivals and fairs;
   - Ethnic communities and neighbourhoods;
   - Architectural and archaeological treasures;
   - National and state parks.

   Source: website of the National Assembly of State Art Agencies in the USA

9. Cultural Tourism, also known as cultural heritage tourism, is travel directed toward experiencing the arts, heritage, and special character of unique places.
   Source: White House Conference on Travel and Tourism in the United States (1995)

10. Visits by persons from outside the host community motivated wholly or in part by interest in the historical, artistic, scientific or lifestyle / heritage offerings of a community, region, group or institution.
    Source: LORD Cultural Resources Planning & Management Inc