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Tourism and Culture Synergies

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Tourism and Culture Synergies

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Foreword

by the UNWTO Secretary-General

In the thousands of years chronicling mankind's progress, civilizations have flourished and fallen, and in their wake, left legacies bearing their indelible mark in the history of the world. These legacies showcase the pinnacle of mankind's abilities, be they in outstanding monuments or in the uniqueness of paintings and music. Heritage tells mankind's story.

Tourism enlivens this heritage. The report on tourism and culture synergies that comes in the aftermath of the International Year of Sustainable Tourism for Development (2017), as declared by the UN, aims at understanding the needs and priorities of UNWTO Member States in regard to cultural tourism and tourism and culture partnerships. It is noteworthy that a long felt necessity for an official definition of *cultural tourism*, included in the report, was met at the 22nd General Assembly of the UNWTO in Chengdu, China, in September 2017. The definition duly recognizes the dual role of tangible and intangible culture and tourism experiences as core elements of cultural tourism that, as the findings of the study confirm, is growing at an unprecedented rate.

I trust that the report and its valuable recommendations which also herald 2018 as the European Year of Cultural Heritage, as designated by the European Union, will help the sector to better harness the power of synergies between tourism and culture in the framework of the Sustainable Development Goals (SDGs) of the UN.

Zurab Pololikashvili
Secretary-General,
World Tourism Organization (UNWTO)

Foreword

by the European Commissioner for Education, Culture, Youth and Sport

Culture is a fundamental part of the tourism experience in Europe, and its importance is growing. Today, cultural tourism is one of the largest and fastest-developing global tourism markets: an estimated four out of ten tourists choose their destination based on its cultural offering. They are increasingly attracted by intangible factors such as the atmosphere of a place, its association with famous people, ideas or events – in other words by a place's culture, history and traditions.

Europe is a key cultural tourism destination thanks to its incomparable cultural heritage that includes museums, theatres, archaeological sites, historical cities and industrial sites, as well as music and gastronomy. Europe's cultural heritage enriches our lives and provides inspiration for our cultural and creative industries. By making Europe a top tourist destination, it helps generate economic growth, employment and social cohesion. The combination of culture and tourism can be a powerful driver of economic activity.

But the benefits of closer links between culture and tourism go beyond the economic returns: travelling to experience the culture of others also means gaining a direct appreciation of cultural diversity, establishing new cultural ties, and helping to keep our cultural heritage alive. In order to ensure this, we need a sustainable approach, which balances the need to boost economic growth and tourism on the one hand, and the preservation of artefacts, historical sites, and local traditions on the other. We all know that in some cities massive tourist inflows are taking their toll on heritage, and also on the quality of life of residents.

I am therefore very pleased that the United Nations declared 2017 the International Year of Sustainable Tourism for Development, while the European Union designated 2018 as the European Year of Cultural Heritage. Together, these years provide a great opportunity to promote and develop synergies between sustainable tourism and culture: an ambition that is fully shared by the EU and the UNWTO.

Tibor Navracsics
European Commissioner for Education, Culture, Youth and Sport

Executive summary

This report reviews the rapidly developing relationship between tourism and culture and the synergies that this creates. The aim is to analyse the current needs and future priorities of UNWTO Member States in developing the relationship between tourism and culture, and provide recommendations for future policy. The analysis is based on information provided by UNWTO Member States and international experts in tourism and culture.

Survey of UNWTO Member States

Following up on the conclusions of the First UNWTO/UNESCO World Conference on Tourism and Culture: Building a new Partnership, an online survey was developed to explore how cultural tourism is understood and perceived in Member States. It covered 44% of UNWTO Member States (69 out of 156 countries), who were asked about their understanding of “cultural tourism”, their priorities and policies in this area, and their views on future development. The following were the main findings of the survey:

Almost all Member States included tangible heritage and intangible heritage in their definition of cultural tourism, and over 80% also included contemporary culture (e.g., film, performing arts, design, fashion and new media, among others). Tangible heritage was rated as the most important element of cultural tourism, followed by intangible heritage and then contemporary culture.

Estimates of the proportion of cultural tourists among international arrivals varied widely. Member States using a broad, activity-based definition of cultural tourism estimated that 47% of their international arrivals were cultural tourists, whereas those with a narrow, motivation-based definition estimated an average of 16%.

Measurements used to estimate the size of the cultural tourism market were slightly more likely to be based on cultural participation data (32%) than cultural motivations (30%). Few countries used both measures. Around 37% of countries had no current measurement of cultural tourism.

Cultural tourism had a specific place in the tourism policy of 90% of respondents, and 69% indicated that it was ‘very important’ to tourism policy. Countries with a cultural tourism policy were more likely to measure cultural tourism, to report larger numbers of cultural tourists and to report higher cultural tourism growth rates.

Around 84% of Member States indicated that cultural tourism had a specific place in their marketing and promotional plan.

For the future, Member States tended to prioritize product development and marketing. As a result, 'understanding tourist behaviour' is an important policy area, followed by diversification.

Other priority areas are developing better measurement and statistics for cultural tourism, balancing promotion and protection of heritage, involving local communities and developing partnerships.

Survey of cultural tourism experts

The 61 cultural tourism experts who responded to the online survey overwhelmingly indicated that both tangible and intangible heritage should form part of the definition of cultural heritage. Over 80% of experts would also include contemporary culture.

Most experts felt that intangible culture was becoming more important in cultural tourism, and that this trend would also continue in the future with the growing demand for engaging and creative experiences.

Cultural tourism demand is viewed as having grown in the past five years, and is also expected to grow in the next five years.

Most experts argued for better measurement of cultural tourism, with a mixture of activity-based and motivation-based indicators.

The main future policy objectives were seen as developing integrated approaches to tourism and culture synergies and increasing community empowerment and inclusion.

The experts felt that there should be more support for cultural tourism, particularly in terms of product development, networking and collaboration and capacity building. Specific actions should include more monitoring of the results of policy implementation and setting shared goals for cultural tourism stakeholders.

Experts placed 'balancing promotion and protection' above 'understanding tourist behaviour' in their ranking of future policy agendas.

The main future challenges for tourism and culture collaboration were seen as differing objectives between stakeholders and problems of coordinating actions by different levels of government.

In depth expert opinion

In his reflection on the results of the research, Greg Richards, UNWTO consultant, identified a number of issues:

The dynamic relationship between tourism and culture means that the nature of the cultural tourist and the culture that they consume is changing rapidly. In particular models of cultural tourism based on tangible heritage are being augmented by growth in intangible heritage and creativity.

This dynamism problematizes the definition of “cultural tourism”, which now has to be considered as a much broader field of synergies between tourism and culture than was the case 20–30 years ago. More stakeholders are involved, and the role of local communities as part of the cultural tourism experience has expanded dramatically. The tourists themselves have also become co-creators of their own experiences.

The broadening of cultural tourism has also generated a wider range of mutual benefits between tourism and culture. These not only include the basic cultural, social and economic returns from tourism, but also aspects such as the development of creativity and atmosphere in destinations, attraction of creative people, expansion of the audience for culture and the support of professional networks and export markets.

In the future it is likely that there will be more convergence between tourism and culture, particularly in the area of the creative industries and consumption of *local* or *everyday* culture. However this will also generate new challenges, particularly in terms of managing tourist access to local communities and dealing with the enlarged range of tourism stakeholders.

Conclusions and recommendations

It is to be noted that during the Twenty-second session of the UNWTO General Assembly in Chengdu, China (11 to 16 September 2017), the following definition for “cultural tourism” was adopted:

“Cultural tourism is a type of tourism activity in which the visitor’s essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination.

These attractions/products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions.”

Cultural tourism is set to remain one of the key tourism markets in the future. The expanded range of cultural phenomena consumed by tourists will also increase the range of stakeholders involved in this market, with local communities becoming one of the keys to the sustainable development of cultural experiences. In order to make effective policies, however, more information is needed on the profile, motivations and needs of cultural tourists. This in turn requires better research, linked more closely to policy objectives.

Specific recommendations include the need to:

- Create a vision for cultural tourism to link and energize stakeholders;
- Generate better information;
- Develop more specific cultural tourism policy;
- Create more targeted cultural tourism marketing activity;
- Ensure cultural protection;
- Make effective use of new technologies; and
- Foster stakeholder collaboration.

Introduction

In recent decades, tourism and culture have become inextricably linked partly due to the increased interest in culture, particularly as a source of local identity in the face of globalization, the growth of tourism and easier accessibility of cultural assets and experiences. Furthermore, cultural tourism has been viewed as a desirable, 'good' form of tourism for nations and regions to develop, because it generates cultural, social and economic benefits.

Synergies between tourism and culture have therefore long been noted. The UNWTO report on *Cultural Heritage and Tourism Development*¹ argued that:

“Culture and tourism have a symbiotic relationship. Arts and crafts, dances, rituals, and legends which are at risk of being forgotten by the younger generation may be revitalized when tourists show a keen interest in them. Monuments and cultural relics may be preserved by using funds generated by tourism. In fact, those monuments and relics which have been abandoned suffer decay from lack of visitation.”

Today, however, the relationship between tourism and culture is being rapidly transformed by changing lifestyles, new forms of culture and creativity and the development of new technologies. The culture related to tourism has become less tangible, more accessible and has been developed in a more bottom-up fashion than in the past. This has created challenges and opportunities for countries around the globe in developing and utilizing the many synergies between tourism and culture.

Culture has an immeasurable inherent value to host communities, and as such, constitutes one of the most important assets for tourism. Equally, tourism can be a considerable force for the promotion and conservation of tangible and intangible heritage while encouraging the development of arts, crafts and other creative activities. Tourism destinations owe much of their attraction to culture, which can transform conventional tourism into creative tourism, providing more authentic and genuine experiences. However, if poorly managed, tourism can also cause negative impacts on culture and heritage, thus inherently damaging the long term sustainability of both the tourism and cultural sectors.

Within this dynamic context UNWTO wishes to review the current state of the relationship between tourism and culture in order to identify the opportunities and challenges provided by the synergies between these two areas. The aim is to analyse the current needs and future priorities of UNWTO Member States in developing the relationship between tourism and culture, and provide recommendations for future policy. The report analyses research conducted with Member States

1 World Tourism Organization (2001), *Cultural Heritage and Tourism Development*, UNWTO, Madrid.

and tourism and culture experts. Online surveys were completed by 69 Member States and 61 tourism and culture experts between November 2015 and March 2016. These surveys generated information on the definition and importance of cultural tourism, cultural tourism policy and future priorities. In addition large amounts of supporting data were submitted for analysis in terms of statistical reports and policy documents.

This work builds on the previous activities organized by the UNWTO and UNESCO in the field of culture, including the *Siem Reap Declaration on Tourism and Culture – Building a New Partnership Model*, and the recent study on *Tourism and Culture Partnership in Peru: Models for Collaboration between Tourism, Culture and Community*. One of the objectives of the current report is to make concrete recommendations about implementing and managing partnerships in the field of tourism and culture.

Chapter 1

Needs and priorities: Tourism and Culture Survey of UNWTO Member States

1.1 Defining and measuring cultural tourism

In order to review the current relationship between tourism and culture globally, a survey was conducted of UNWTO Member States. This was designed to explore how cultural tourism is understood and perceived and to review needs and priorities for cultural tourism development and tourism and culture partnership.

An online survey was sent to all UNWTO members in November 2015. The survey consisted of 10 questions, including questions on the definition and size of the cultural tourism market, cultural tourism policy, the role of cultural tourism in marketing strategies, priorities for future development and the current state of cultural and tourism partnerships. In total, 69 countries responded to the survey by January 2016. The regional distribution of responses is shown in table 1.1.

Table 1.1 Distribution of responses to the tourism and culture survey by world region

Region	Number of UNWTO Member States	Number of responding Member States	Responses (%)
Africa	49	15	30.61
Americas	24	10	41.67
Asia and the Pacific	29	12	41.38
Europe	41	28	68.29
Middle East	13	4	30.77
Total	156	69	44.23

Note: Regions according to UNWTO's regional division. For further information, please consult: www.unwto.org.

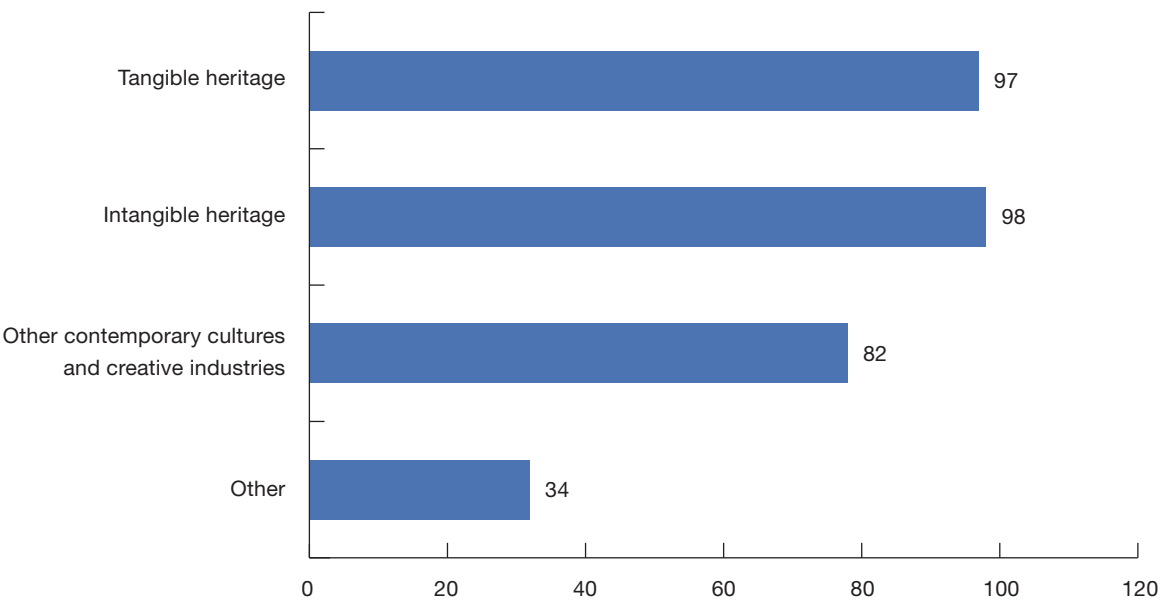
The overall response rate of 44% of the 156 UNWTO Member States is a good average for the reliability of the survey results. It is significant that the responding countries accounted for 521 million international arrivals in 2014, or 46% of the global total.

1.1.1 Culture, heritage and tourism

Countries were first asked to specify which areas of culture and heritage they include in the category of 'cultural tourism' (figure 1.1). Almost all respondents indicated that they include both tangible (e.g., national and world heritage sites, monuments, historic places and buildings, cultural routes, and others) and intangible heritage (e.g., crafts, gastronomy, traditional festivals,

music, oral traditions, religious/spiritual tourism, etc.) in their definition of cultural tourism. Most countries (82%) also indicated that they consider cultural tourism to include contemporary culture (e.g., film, performing arts, design, fashion, new media, etc.). Those who did not include contemporary culture in cultural tourism were all emerging destinations.

Figure 1.1 Areas included in definitions of cultural tourism, Member States responses (%)



Notes: Multiple responses were possible.
Tangible heritage: e.g., national and world heritage sites, monuments, historic places and buildings, underwater archaeology.
Intangible heritage: e.g., handicrafts, gastronomy, traditional festivals, traditional music, oral traditions, religion.
Other contemporary cultures and creative industries: e.g., film, performing arts, design, fashion, new media.
Other: e.g., sports, education, health, shopping.

Just over 34% of responding countries also indicated that they included ‘other’ elements in their definitions of cultural tourism. These included: sports tourism, languages, religious festivals, crafts and gastronomy. Many of these were mainly items that could also be covered by the general category of intangible heritage or contemporary culture.

Some of the comments made by respondents underlined the fact that tangible and intangible heritage and contemporary culture were often integrated in cultural tourism, as the Dutch National Tourist Office noted:

“Cultural tourism can be defined as travelling outside the usual environment for the supply of cultural or cultural life, in order to visit or participate in cultural activities. For example a visit to a museum, a concert, a historic landscape or monument but also active participation to/in folklore or a cooking course.”

The mix of tangible and intangible heritage with contemporary culture was also seen as imparting uniqueness to the cultural tourism product, which cannot be experienced elsewhere (box 1.1).

Box 1.1

Heritage as a unique tourism asset

Many countries use their unique culture as a means of positioning and marketing themselves, as these examples indicate:

“Another aspect that includes both tangible and intangible heritage is the lifestyle of the Fijian people that embodies their cultural lineage passed down from generation to generation. Visitors are provided the opportunity to experience this way of living that is unique to the Fijian people.”

“Bosnia and Herzegovina is a country of long and rich history, [whose] cultural heritage presents a complex mixture of prehistoric, medieval, Ottoman, Austro-Hungarian and Central European influences making the country a unique attraction for cultural tourism.”

“Cultural tourism is a key aspect in the marketing strategy. We use a unique culture and tangible and intangible cultural heritage of the Czech Republic as the main attraction.”

Sources: Ministry of Industry, Trade and Tourism of Fiji;

Ministry of Foreign Trade and Economic Relations of Bosnia and Herzegovina; and

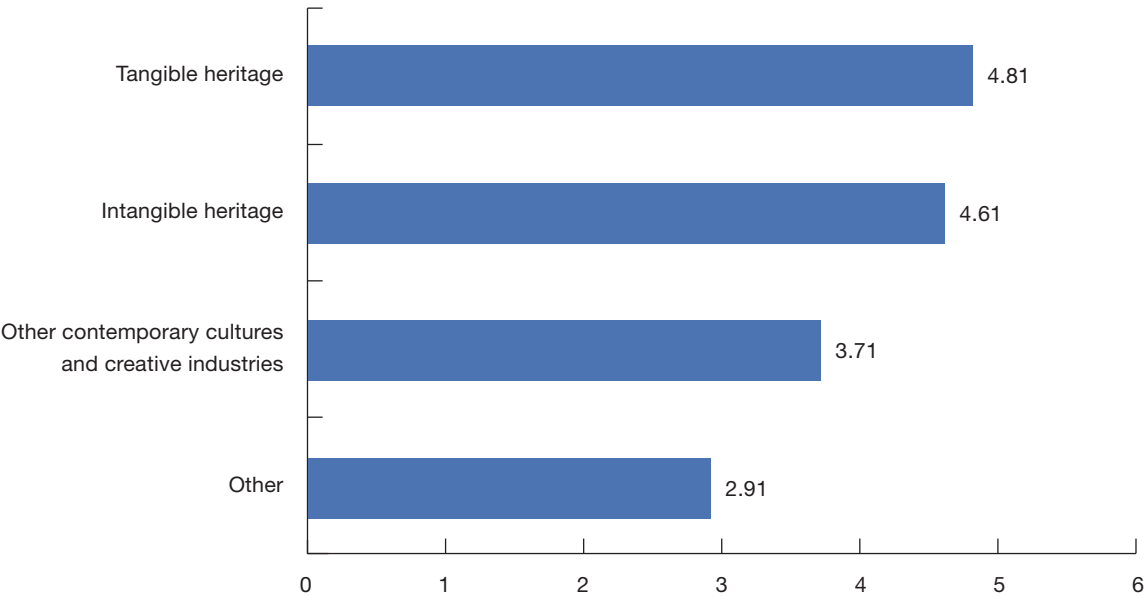
Ministry of Regional Development of Czech Republic.

In general, it seems that all aspects of heritage are recognized by most countries as constituting cultural tourism resources. Responses indicated that this includes elements such as languages, traditions, customs and religious practices. It should be noted that religious heritage is important as part of cultural tourism, but this is an issue not specifically covered in the survey.

Contemporary culture is also viewed as part of cultural tourism by the majority of countries, although there is a sizable minority that does not give emphasis to such products.

In terms of relative importance, tangible heritage was rated as ‘very important’ (5 on a scale from 1 to 5) by almost all countries, with an average score of 4.8 (figure 1.2). Intangible heritage was also rated by most countries as ‘very important’, although with a slightly lower average score (4.6). In contrast contemporary culture tended to be rated as less important, with an average score of 3.7, in particular in countries which have a combined ministry for tourism and culture, indicating that these combined institutions may focus more on heritage rather than contemporary culture.

Figure 1.2 Importance of tangible and intangible heritage, and contemporary culture resources, Member States responses (average scores)

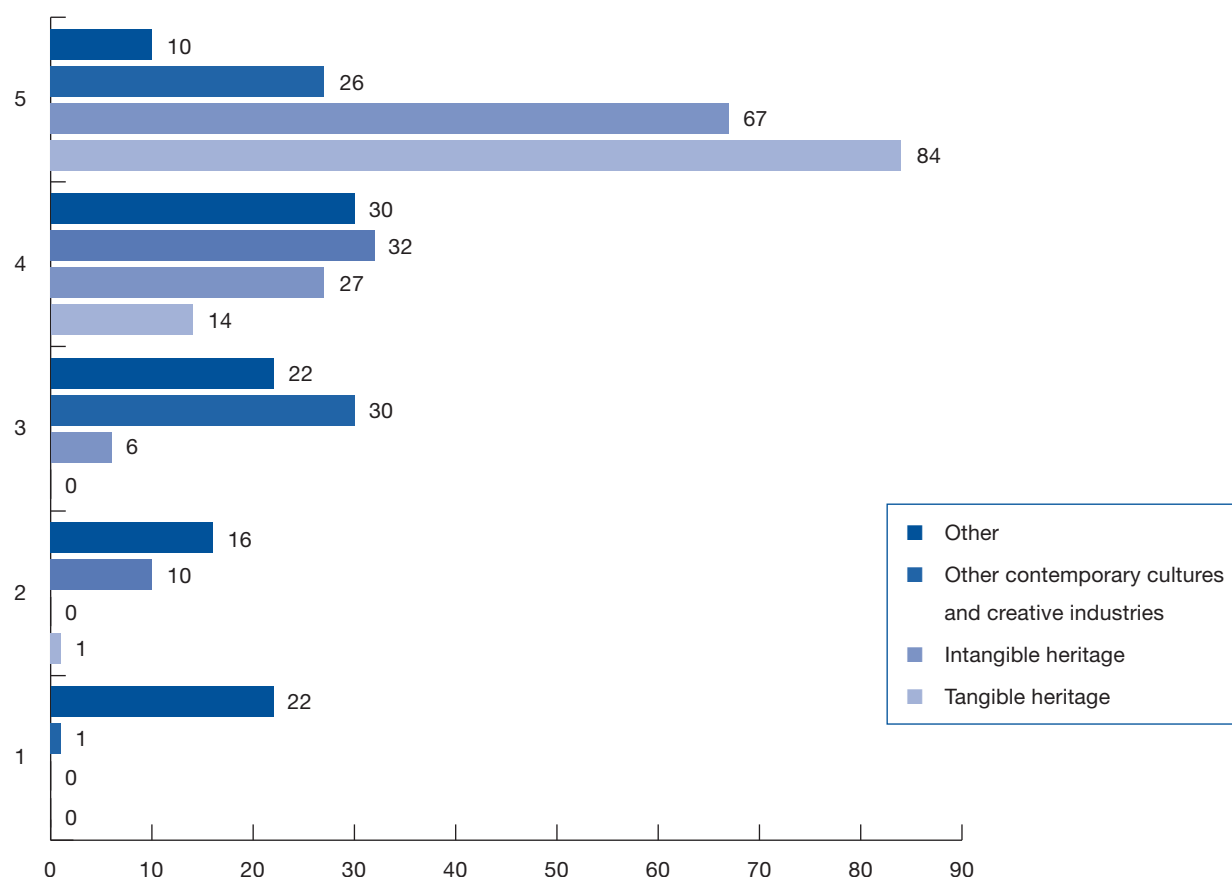


Notes: 1 = low importance; 5 = high importance.
Tangible heritage: e.g., national and world heritage sites, monuments, historic places and buildings, underwater archaeology.
Intangible heritage: e.g., handicrafts, gastronomy, traditional festivals, traditional music, oral traditions, religion.
Other contemporary cultures and creative industries: e.g., film, performing arts, design, fashion, new media.
Other: e.g., sports, education, health, shopping.

The differences can be seen more clearly when the scores are broken down by importance category. This shows that tangible heritage is given the highest importance (5) by over 80% of respondents, compared with 67% of respondents in the case of intangible heritage and 26% of respondents for contemporary culture (figure 1.3).

Countries that indicated that ‘other’ types of culture were important were also more likely to measure cultural tourism, but less likely to prioritize product development. In terms of world regions, countries in Africa were most likely to mention other forms of culture (e.g., traditional forms of transport, herbal medicine or religious practices), and European countries the least.

Figure 1.3 **Importance of tangible and intangible heritage and contemporary culture resources, Member States responses (%)**



Notes: 1 = low importance; 5 = high importance.

Tangible heritage: e.g., national and world heritage sites, monuments, historic places and buildings, underwater archaeology.

Intangible heritage: e.g., handicrafts, gastronomy, traditional festivals, traditional music, oral traditions, religion.

Other contemporary cultures and creative industries: e.g., film, performing arts, design, fashion, new media.

Other: e.g., sports, education, health, shopping.

Box 1.2 The expanding notion of culture and heritage

The recently adopted law on intangible cultural heritage in Spain illustrates the way in which concepts of heritage and culture conservation have changed in recent years:

“The concept of cultural heritage has continued an uninterrupted enlargement process over the last century. The artistic, historical and monumental heritage continues as core values and types, but it has also incorporated other elements that make up a new expanded notion of culture. This responds to a new conception derived from scientific theorizing of ethnology and anthropology, which increased social awareness of these other expressions and manifestations of culture. This process could be synthesized in the idea of a transition from ‘objects’ to ‘activities’ or, in more modern terms, from material assets to intangible assets.”

“The intangible cultural heritage shall be considered to include the practices, representations, expressions, knowledge and skills that communities, groups and, in some cases, individuals recognize as an integral part of their cultural heritage, and in particular: a) traditions and oral expressions, including modalities and linguistic characteristics as a vehicle of intangible cultural heritage; as well as traditional place names as an instrument for the valorization of the

geographical name of the territories; b) performing arts; c) social practices, rituals and festive events; d) knowledge and practices concerning nature and the universe; e) traditional craftsmanship; f) gastronomy, culinary preparations and food; g) Specific uses of natural landscapes; h) forms of collective socialization and organizations; i) sound demonstrations, music and traditional dance.”

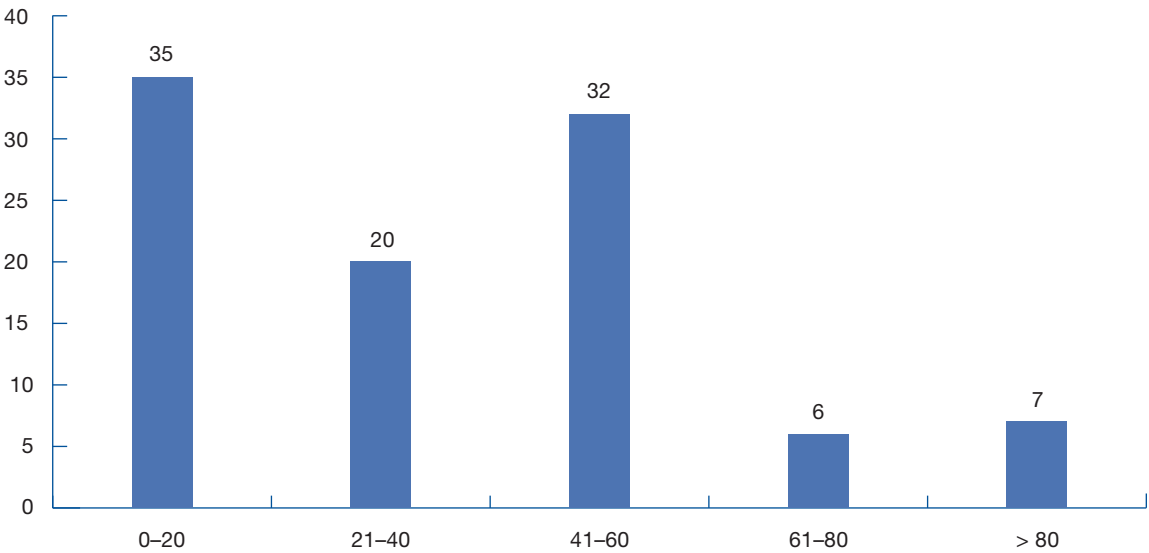
This concept of intangible cultural heritage builds on the UNESCO (2003) definition, but adds some nationally-specific elements, such as the valorization of place names.

Source: Spanish Government (2015), Ley 10/2015, de 26 de mayo, para la salvaguardia del Patrimonio Cultural Inmaterial, Jefatura del Estado «BOE», núm. 126, de 27 de mayo de 2015 Referencia: BOE-A-2015-5794.

1.1.2 Cultural tourism market size

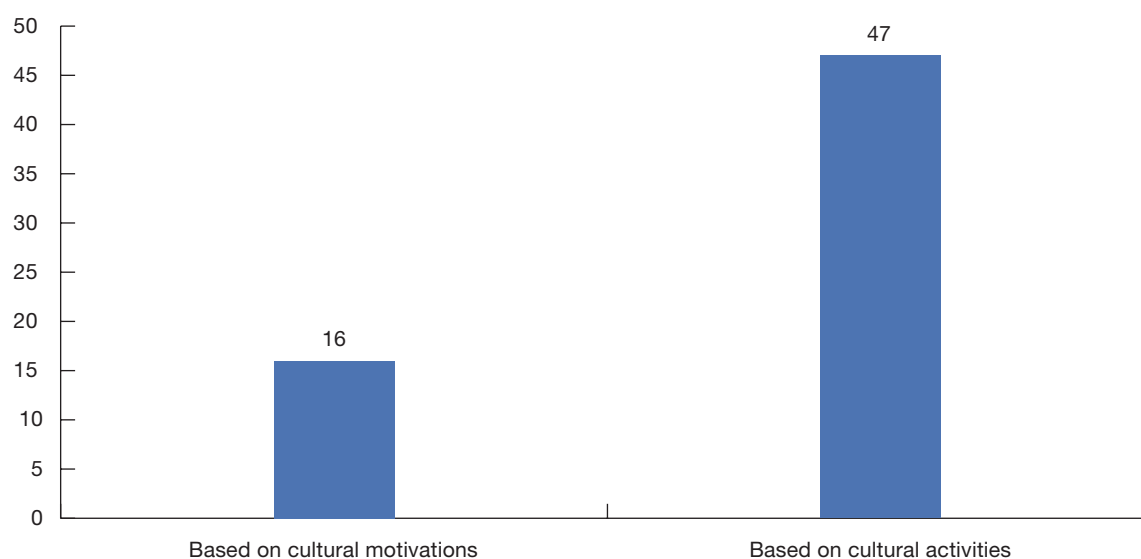
Countries were asked to estimate the size of their cultural tourism market, in terms of the percentage of inbound tourists accounted for by cultural tourism in 2014. A total of 38 countries provided an estimate, or 55% of respondents. The overall average percentage of cultural tourists reported was 35.8 %. However, there was a wide range in the estimates, from a minimum of 2% to a maximum of 100%. In figure 1.4 we can see that the estimates cluster around two categories, a lower cluster of up to 20% cultural tourism and another cluster between 40 and 60%.

Figure 1.4 Country estimates of cultural tourism market as a proportion of inbound tourism, Member States responses, 2014 (%)



It is clear that these estimates of the proportion of cultural tourism relate to the means of estimation, with the lower figure linked to those countries who use measures related to the proportion of tourists with a cultural motivation, and the higher figures coming from countries that use figures for the proportion of tourists visiting cultural sites. When we analyse the proportion of cultural tourists according to the estimation method, we see that the *narrow* measure of cultural tourism averages around 16%, and the broad measure is around 47% (figure 1.5).

Figure 1.5 **Proportion of cultural tourists according to estimation method 2015, Member States responses (%)**



This is a significant finding, because it tends to support many of the assertions made in previous studies. For example, the ATLAS surveys tended to indicate between 5–10% of tourists could be classified as ‘specific cultural tourists’ who are motivated to travel by culture.¹ On the other hand, many studies have indicated that about 40–50% of tourists undertake cultural activities.²

When the estimates of the proportion of cultural tourists are weighted by the actual number of international arrivals in 2014, then the figures derived depend heavily on the methods used to estimate cultural tourism (table 1.2). For those countries using a narrow definition of cultural tourism based on motivations, the proportion of cultural tourists averages just under 14%, whereas for those countries using a broad definition the proportion is just over 39%. It should be noted that these figures are based on responses from 38 countries in total, or just over half of the responding countries. However, the available data indicate that the previous estimates made by the UNWTO and others (see chapter 3 of this report) are fairly accurate.

Table 1.2 **Estimates of international cultural tourism arrivals, according to definition, 2014**

Method used to estimate cultural tourism (number of respondents)	Total number of international arrivals (UNWTO)	International cultural tourism arrivals	
		(from Member States survey)	(%)
Narrow definition (15)	223,290,000	30,743,000	13.7
Broad definition (23)	144,666,000	56,584,274	39.1

¹ Richards, G. (2001), *Cultural Attractions and European Tourism*, CAB International, Wallingford.

² Organisation for Economic Co-operation and Development (2009), *Impact of Culture on Tourism*, OECD, Paris.

Countries with a combined ministry of tourism and culture tended to report a slightly higher level of cultural tourism (45%) than other respondents.

As well as being seen as a significant proportion of the tourism market, cultural tourism is also viewed as a growth market.³ When asked if the volume of the cultural tourism market had changed in the past five years, widely varying rates of change were described, ranging from almost 130% increase to a 30% decrease. The countries reporting the highest growth rates tended to be in the Americas, whereas there was no growth in the Middle East.

The average reported growth rate in cultural tourism for the previous five years was just over 20%, or around 4% per year. However, when these figures are weighted according to the volume of international arrivals for each reporting country, the growth rate increases to just under 23%, or 4.5% per annum. The overall growth in world tourism in the same period has been just over 19%, or 3.9% a year. This provides some support for the general idea that cultural tourism is growing faster than global tourism as a whole, although the difference is perhaps not as great as may have been suggested by some studies.

The reported growth of cultural tourism is not strongly related to the percentage growth in international tourism arrivals, but it is directly linked to the absolute growth in numbers of inbound tourists. The overall growth in tourism between 2010 and 2014 is much larger for those countries that specifically feature cultural tourism in their marketing policy (66%) than for other countries (17%). Countries with a combined ministry also had a slightly higher tourism growth rate (21%) than other respondents (17%). Countries that do not measure cultural tourism have a lower tourism growth rate (15.0%) than those that do measure (19.5%). This seems to indicate that greater attention for cultural tourism is linked to stronger cultural tourism growth. It is not possible from these data to determine if increased cultural tourism growth leads to greater government attention, or if more government action stimulates greater cultural tourism growth.

When asked about the reasons for the change in the size of the cultural tourism market, countries were most likely to mention product development and marketing measures. These included the diversification of the cultural product, new attractions, cultural routes and events. Marketing activities were also seen as important.

Guatemala commented that the growth in cultural tourism was due to “promotion investment, especially digital marketing”. Market trends, such as increased interest in culture or the general growth in tourism, were mentioned less often. For the relatively few countries where cultural tourism has decreased, the impact of the economic crisis and a lack of new cultural products were mentioned.

The Member States were also asked for information on the level of cultural tourism among day visitors and domestic tourists. The same-day visit market was not monitored by many countries. For the ten countries that provided figures, the size of the cultural tourism excursion market was 180% of the number of overnight visitors.

3 Richards, G. (2001), *Cultural Attractions and European Tourism*, CAB International, Wallingford.

Only 22 countries could provide estimates of the size of the domestic cultural tourism market. These suggested that the domestic cultural tourism market (implying staying visitors rather than day trips) was about a third of the international cultural tourism market. However, this is highly dependent on the size of the domestic tourism market, and in some cases can be much more significant. For example, in Spain it was estimated that almost 61% of domestic tourists undertook some form of cultural activity in 2014, versus 56% of international tourists visiting Spain.⁴ This puts the number of domestic cultural trips at 91 million, compared with 36 million cultural trips by international tourists.

When asked if the estimated size of the domestic cultural tourism market had increased, only 16 countries could provide data. For these countries the average increase over the five years between 2010 and 2014 was 24%, or 4.8% a year. It is not possible to compare this to general growth rates, because domestic tourism figures are not available for many countries.

Among the reasons given for the growth of cultural tourism were increased supply, increased interest in culture, broadening access to culture and increased security. For those countries that had seen a decline in cultural tourism, the economic crisis or political instability was often cited.

1.1.3 Measuring cultural tourism

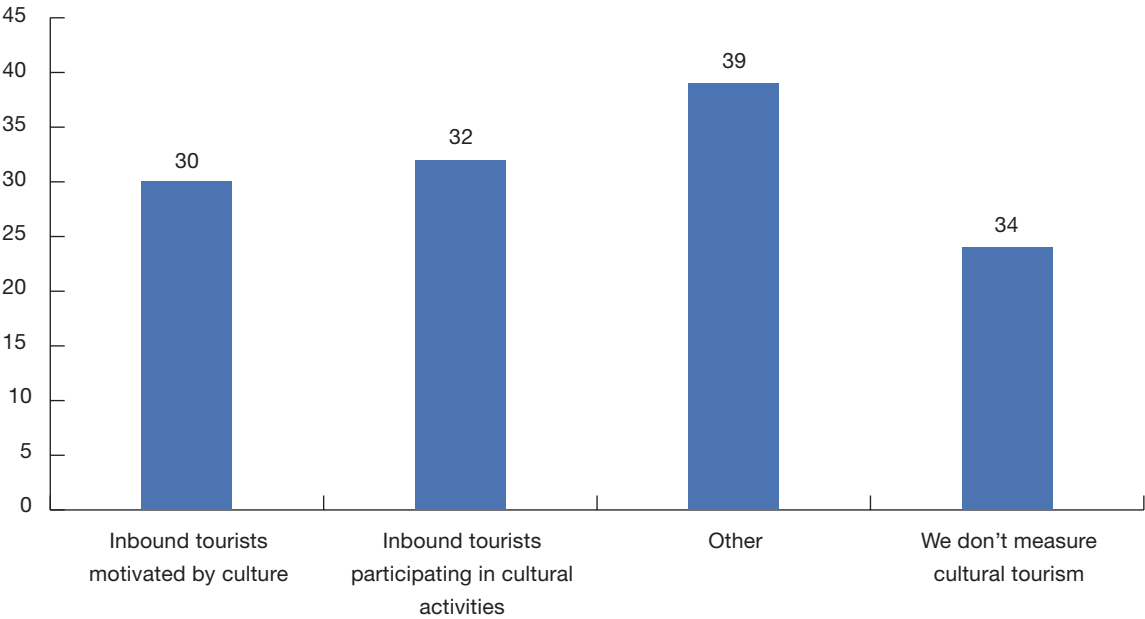
Respondents were asked to indicate the measures they use to estimate the current size of their cultural tourism market. Of those countries measuring cultural tourism, slightly more used cultural participation data (32%) than cultural motivations (30%), while 25% used some other measurement (figure 1.6). Ten countries (15%) indicated that they measure both cultural participation and cultural motivations. Around 35% of responding countries indicated that they do not measure cultural tourism at all. There was a particularly high proportion of respondents from the Americas (five out of nine countries) who did not measure cultural tourism.

The group of countries that do not measure cultural tourism tend to have fewer specific policies related to cultural tourism. Around 31% of countries without a specific cultural tourism policy make any measurement, compared with around 70% of countries with a specific policy. Similarly, only 27% of countries without a specific marketing plan for cultural tourism measured the volume of cultural tourism. Of those countries with a specific marketing plan, 72% measured cultural tourism flows. Countries that do not measure cultural tourism flows tend to rank both tangible and intangible heritage as less important than countries that do make measurements (figure 1.7). The countries who do measure cultural tourism had much higher numbers of international tourism arrivals than those who do not, and tend to represent the more developed tourism economies.

A number of countries that do not currently measure cultural tourism indicated that they had plans to do so in future.

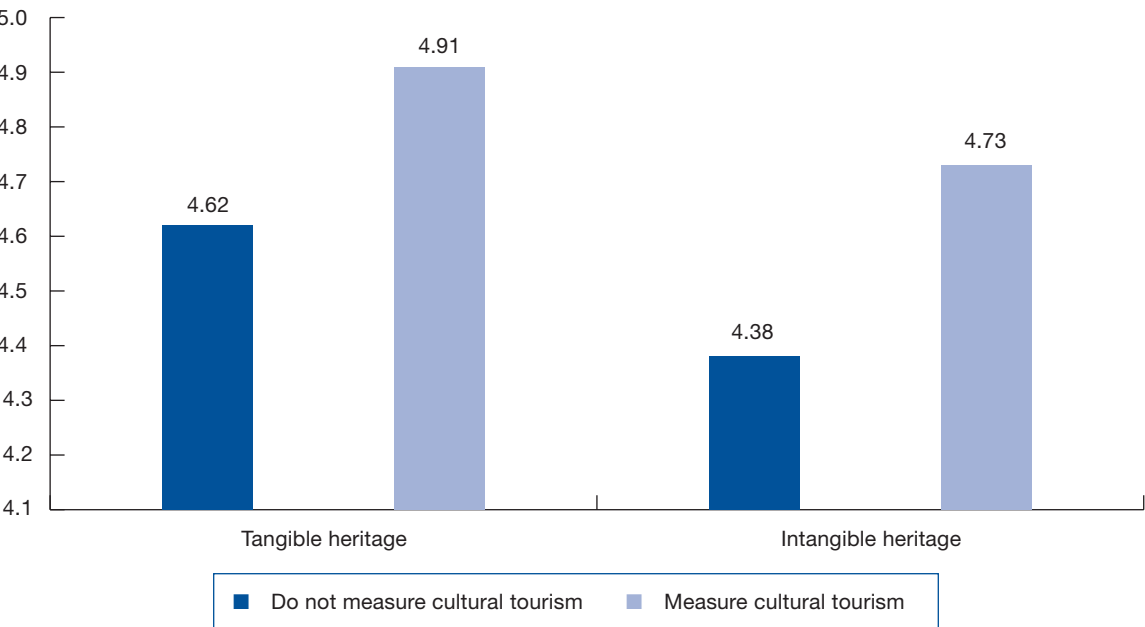
4 Ministerio de Educación, Cultura y Deporte (2015), *Anuario de estadísticas culturales 2015, Principales resultados*, MECD, Madrid.

Figure 1.6 Measures used to estimate the current size of the cultural tourism market, Member States responses (%)



Note: Multiple responses were possible.

Figure 1.7 Measurement of cultural tourism versus importance of tangible and intangible heritage, Member States responses

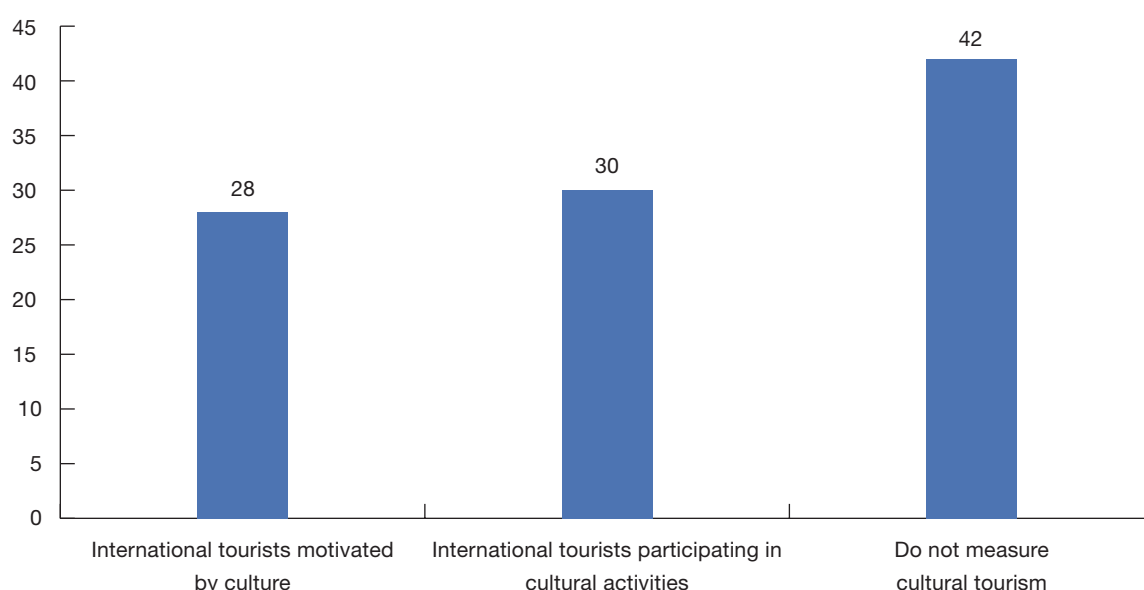


Note: 1 = low importance, 5 = high importance.

1.1.4 Culture as a motivation for tourism

It is widely recognized that culture is often a primary motivation for tourists to visit a destination, but that it can also be important as a secondary motivation for travel. Some countries were able to provide estimates of the proportion of tourists who had a primary or secondary cultural motivation. For the 17 countries able to provide figures on the primary motivation of inbound tourists, the average reported was around 30% (figure 1.8). For countries measuring culture as a secondary motivation, the average was 17% of inbound tourists. Some countries also monitor the proportion of international tourists undertaking cultural activities during their visit. The 20 countries that provided these figures indicated that the average proportion of tourists engaging in cultural activities is 40%. Adding primary and secondary motivations of inbound tourists together produces an overall figure of culturally motivated tourists of around 47%, which is higher than the estimated proportion of inbound visitors undertaking cultural activities. The pattern that emerges is that there is a core market of tourists who travel primarily for culture, and there is a larger market of visitors who are interested in undertaking cultural activities, even though this is not their primary reason for travel.

Figure 1.8 **Measures used to estimate the current size of the cultural tourism market, Member States responses (%)**



1.2 Cultural tourism policies and marketing

1.2.1 Cultural tourism policies

When asked if cultural tourism has a specific place in their tourism policy, an overwhelming majority (90%) indicated that it did (see also annex I, figure I.5). Cultural tourism was often seen as a core market for international tourists, and therefore as an important policy concern. A typical comment was made by Papua New Guinea Tourism Promotion Authority, which “identifies cultural tourism as a significant source for national tourism growth due largely to the fact that authentic cultural experiences are Papua New Guinea’s biggest selling tourism product.”

Box 1.3

Tourism policy in Malta

Cultural tourism is an important segment in Malta, both in terms of visitors primarily motivated by culture and the combination of beach holidays and culture. Over 18% of international tourists were motivated to visit Malta for sun and culture, and a further 15% by culture alone.^a This indicates that the culturally-motivated tourism market accounts for around a third of international tourism. In addition, over three quarters of international tourists undertook at least one cultural visit during their stay.

The importance of culture is also underlined by the economic value of tourism spending:

“Total tourist expenditure in the cultural and creative industry sectors in 2012 amounted to around EUR 77 million, which is almost 8% of total tourist expenditure. This share is up from the 2009 estimate of around 6% of tourist spending, which compared with 3.4% of household expenditure for Maltese residents. This suggests that tourism generates higher levels of spending on creative goods and services than normal leisure time expenditure by residents.”^b But there are also broader benefits in developing cultural tourism: “A further benefit of attracting tourists from more distant markets lies with the fact that this type of tourism not only attracts a more lucrative and higher spending category of visitor but also adds to the perceived sophistication of the destination as a place which is trendy and attractive to a multitude of cultures and nationalities.”^c

As a result, the latest tourism policy aims “to decrease the country’s dependency on the ‘summer sun’ segment and increase the market share for trips having main motivations of ‘winter sun’, ‘culture’, ‘sports’ and ‘conference and incentive’ travel.”^d To achieve this diversification, the island “needs to continue developing its dual nature by strengthening its image as a sophisticated destination that can offer the charms and attractions of a Mediterranean archipelago with emphasis on good weather and a wide range of coastal activities, underscored by a vibrant local community with its diverse culture and rich millenary history.”^e

This also implies adopting a new approach to culture: “Such a conscious shift requires a much broader definition of culture beyond historical sites, museums and traditional manifestations to include other tangible and intangible elements of Maltese life which are ultimately connected to the lifestyle experiences which tourists are increasingly seeking.”^f

Malta has therefore identified potential target groups based on motivation, with the main cultural segments as follows:

- Culture enthusiasts: leisure tourists purely motivated by cultural experiences and activities; and
- Culture and sun seekers: travellers seeking to explore and experience a different culture in an enjoyable weather setting.

The Malta Tourism Authority also recognizes that developing the relationship between tourism and culture has certain challenges, such as the need to develop: “More awareness of Malta’s history and culture by people working in the industry is required in order that this knowledge is transmitted to visitors.”^g

a) Malta Tourism Authority (2015), *Tourism in Malta: Edition 2015*, MTA, Valletta.

b) Organisation for Economic Co-operation and Development (2014), *Tourism and the Creative Economy*, OECD, Paris.

c) Malta Tourism Authority (2015), p. 27.

d) Malta Ministry for Tourism (2015), *Draft National Tourism Policy 2015 – 2020*, p. 14 (online), available at: mhra.org.mt (28-11-2016).

e) *ibid.*, p. 23.

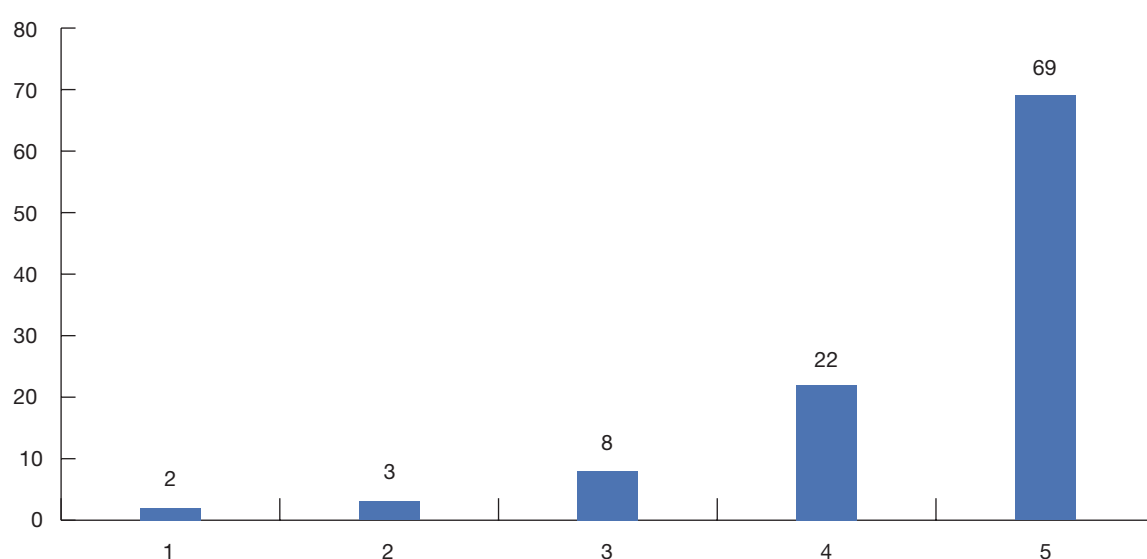
f) *ibid.*, p. 23.

g) *ibid.*, p. 57.

Those countries with a specific cultural tourism policy were also more likely to measure cultural tourism (70%) compared with those which did not have a policy (29%). Countries with a combined tourism and culture ministry were also slightly more likely to have a cultural tourism policy.

Those countries which have a specific reference to cultural tourism in their tourism policy were then asked to indicate its importance. 69% of responding countries indicated that it was 'very important' (figure 1.9). The importance given to cultural tourism policy was directly related to the level of cultural tourism. Countries with a cultural tourism policy tended to attract a higher proportion of cultural tourists and also reported a higher cultural tourism growth rate than other countries.

Figure 1.9 Importance of cultural tourism within the country's tourism policy, Member States responses (%)



Note: 1 = low importance; 5 = high importance.

Box 1.4 Tourism policy priorities in Malaysia

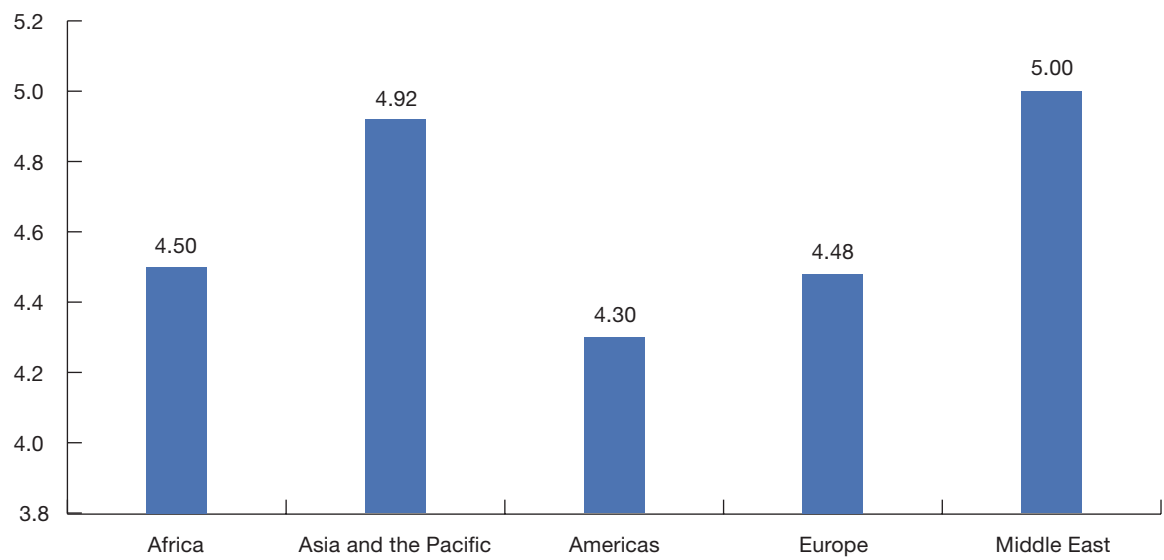
The close links between cultural tourism within overall tourism policy are seen in many countries. In the case of Malaysia, the main aims of tourism policy are:

1. To strengthen the arts, culture and heritage towards enhancing national unity based on the National Cultural Policy;
2. To enhance the synergy and cooperation among the tourism and culture industry players towards making Malaysia the preferred tourist and cultural destinations;
3. To strengthen the tourism and culture sectors towards empowering the nation's economy;
4. To promote Malaysia's uniqueness in arts, culture and heritage as the main catalyst for the growth in tourism and culture sectors; and
5. To develop knowledgeable, skilled, creative and innovative human capital in tourism and culture sectors.

As the Malaysian response to the Tourism and Culture Survey underlines: "In Malaysia, cultural tourism development has been identified as new niche products to be developed extensively in tourism development. Cultural vibrancy is clearly manifested in the on-going and successful *Malaysia: Truly Asia* promotional drive by the country's promotion arm, Tourism Malaysia. In this promotion, Malaysia boasts a wide variety of Asian ethnic groups thus making it into a little Asia. Malaysia also has distinctive multicultural architectural heritage with strong Islamic, Chinese and Western influences; all of which have been portrayed in the heritage buildings."

There were some regional differences in the estimated policy importance of cultural tourism, with countries in Asia and the Pacific in particular being most likely to indicate a high importance (figure 1.10). However, owing to the predominantly high scores given, these differences were not statistically significant.

Figure 1.10 Policy importance of cultural tourism by region, Member States responses



Note: 1 = low importance; 5 = high importance.

There is a relatively small difference in the importance assigned to cultural tourism in tourism policy by those countries who measure cultural tourism (4.7 out of 5) compared to those who do not measure cultural tourism (4.4 out of 5), although this difference is not statistically significant. In general terms, even those countries who do not currently measure cultural tourism think that it is relatively important in their tourism policy.

1.2.2 Position of cultural tourism in marketing

A very high proportion of respondents (85%) indicated that cultural tourism has a place in their marketing and promotional plan (see also annex I). Interestingly, however, four countries indicated that cultural tourism has a role in marketing, even though it is not important within tourism policy (Botswana, Republic of Korea, Liberia, and Switzerland), and seven countries said cultural tourism was important in policy terms, but not important for marketing (Brunei, Kyrgyzstan, Madagascar, Moldova, Seychelles, Timor-Leste and Venezuela). Bosnia and Herzegovina, Iraq and Sao Tome and Principe did not see cultural tourism as important either in terms of tourism policy or marketing.

Countries with cultural tourism in their marketing plans were significantly more likely to see tangible heritage and contemporary culture as important elements of their cultural tourism product. They were also more likely to report larger numbers of cultural tourists and to have a higher rate of cultural tourism growth.

Box 1.5

Marketing activities related to cultural tourism

In their survey responses, many countries mentioned specific marketing initiatives related to tourism and culture, including using culture for branding and in specific marketing activities. This is clear in the cases of India and Azerbaijan.

India: The Ministry of Tourism, Government of India recognizing the important dimension and role of Cultural Tourism as a positive instrument for tourism development has laid more emphasis on showcasing cultural, natural historical richness and heritage characters and position India as a “Must Experience” and “Must Revisit” destination for global travellers.

Azerbaijan: Azerbaijan is proposing a number of international historical and cultural routes, which are now prepared for international certification in collaboration with European cultural route institutions. These include the Wine Tour, Great Silk Way, Alexander Dumas in Caucasus, reflecting the variety of tastes and preferences. There is a tradition of announcement of cultural and art capitals of Azerbaijan in various areas for each year. For instance, in year 2012 Masalli [was] announced the [as] “Capital of folklore”, Guba the “Capital of Crafts” and Gedabek the “Capital of Legends”.

1.3 Needs and priorities in cultural tourism development

1.3.1 Stakeholder collaboration in tourism and culture

As collaboration between stakeholders is one of the important aspects of developing synergies between tourism and culture, specific questions were asked about this issue. The different aspects of the stakeholder collaboration model developed by Gray enumerated below were operationalized into a series of questions. These covered the different stages from the early formation of collaboration networks (identification of stakeholders) to the later stages of network formalisation. The model covers three basic stages of collaboration: problem setting, direction setting and implementation.⁵

1. Problem setting: awareness creation, identification of stakeholders;
2. Direction setting: setting shared goals, giving mutual support, elaborating and assigning tasks; and
3. Implementation: regulatory policies, monitoring.

The most frequently mentioned aspects of stakeholder collaboration for the respondents were awareness creation, setting shared goals and monitoring. Regulatory policies were least likely to be seen as important, probably because cultural tourism in itself is not usually a specific area in which regulation is needed.

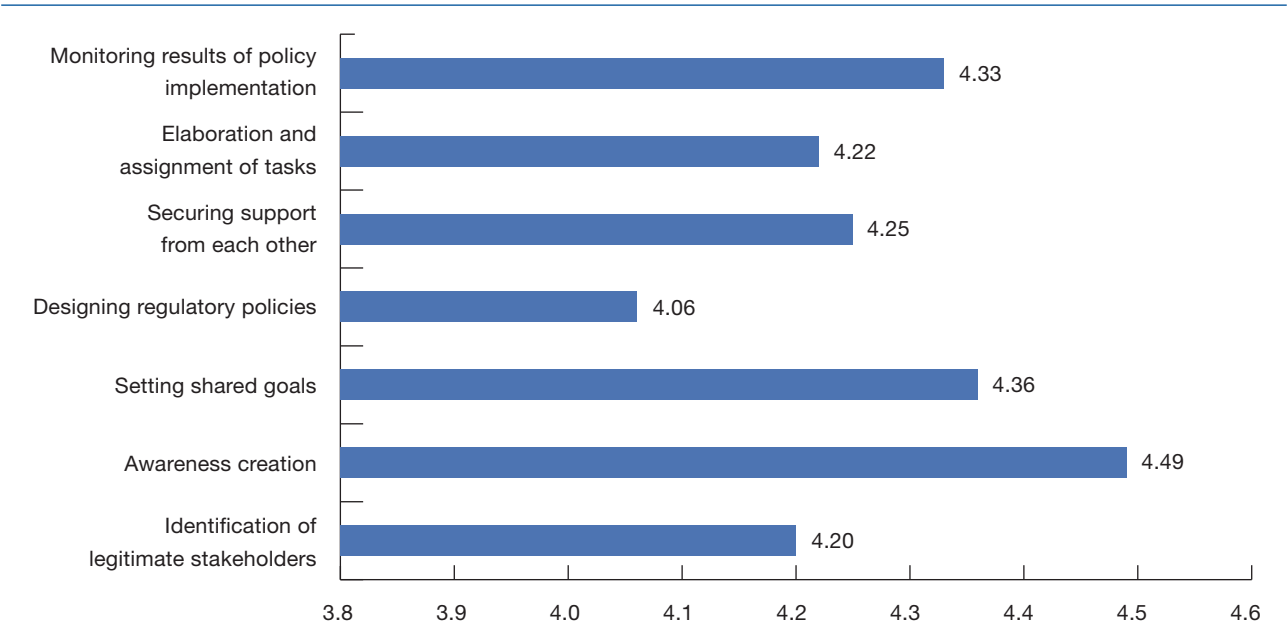
The general indication is that many countries are still in the early stages of stakeholder collaboration in the development of cultural tourism. Making stakeholders aware of the importance of the tourism-culture relationship and agreeing on shared goals are therefore important challenges currently faced by many countries. For example, Mexico commented: “It is vital to the political will and conviction of the members and officials at the highest level with regard to the promotion of cultural tourism and the joint cooperation of both sectors, so that the efforts of operational staff can see crystallized achievements and concrete goals reached.” However, Italy also remarked that because the country has a combined culture and tourism ministry, some issues related to stakeholder collaboration do not receive due recognition.

5 Gray, B. (1985), ‘Conditions Facilitating Interorganizational Collaboration’, *Human Relations*, volume 38 (10), pp. 911–936.

Box 1.6 Developing stakeholder collaboration

The Association of Croatian Travel Agencies organized a series of networking events in cooperation with various cultural institutions, with the financial support of the Ministry of Tourism. These events included new museums, “forgotten” museums, cultural attractions and other cultural institutions. During these events cultural institutions presented their offer and discussed with tour operators the new tourism products which can be developed together. Participants from travel agencies pointed out in evaluations that this kind of event combining site visits and exchange of information is very useful and inspirational for improving cooperation and development of new, different products of cultural tourism.

Figure 1.11 Importance of stages of collaboration process between tourism and culture, Member States responses



Note: 1 = low importance; 5 = high importance.

Awareness creation was viewed as more important by those countries that have a cultural tourism policy than those who do not. Those countries that gave monitoring a higher priority were also more likely to be interested in diversification and the development of specific products such as cultural routes, urban and rural regeneration and support for the creative industries.

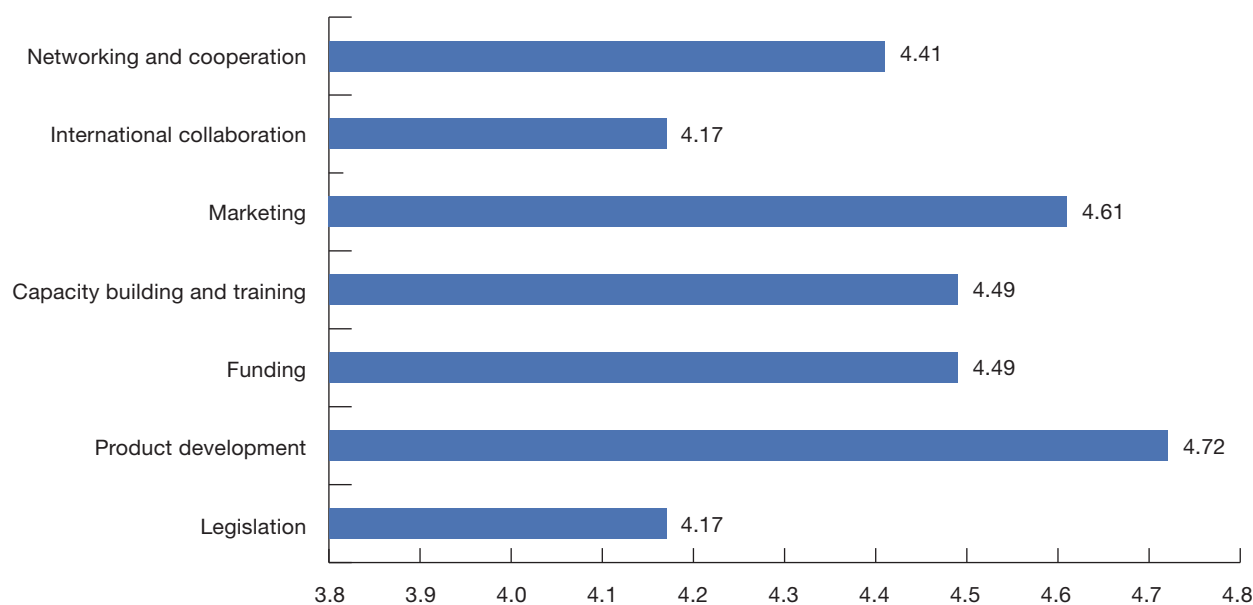
There were few significant differences in terms of the development of stakeholder collaboration by location or cultural tourism policy adoption. However, those countries for which cultural tourism has a specific place in tourism policy were significantly more likely to be involved in the elaboration and assignment of tasks than other countries.

1.3.2 Future needs and priorities

The Member States were asked about their future priorities and needs in relation to cultural tourism. In general the main priorities are product development and marketing. The lowest priorities are legislation and international collaboration. There were no significant differences in the order of priorities according to world region.

Most countries tend to prioritize the development of cultural products and experiences and marketing. This product focus is more important than the wider support mechanisms provided by capacity building or funding. Collaboration and networking receive an even lower priority, even though this is viewed as an important barrier in many countries (see figure 1.12 and expert comments). In general, those countries with a cultural tourism marketing policy rank product development and marketing as a higher priority than other countries.

Figure 1.12 Needs and priorities in cultural tourism, Member States responses



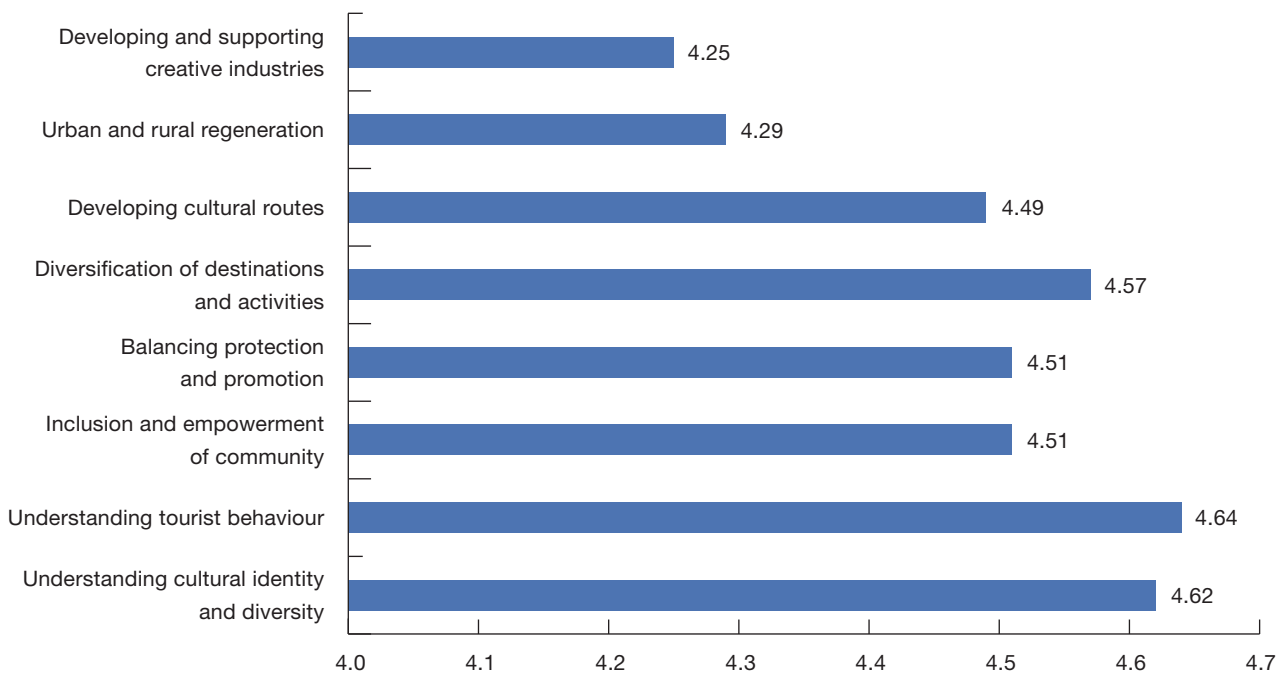
Note: 1 = low priority; 5 = high priority.

The range of product development activities prioritized by different countries is often very broad. Moldova mentioned a number of forms of culture that will be developed through the Tourism Development Strategy “Tourism 2020”, including “cultural, gastronomic, social, sports, automobile, weekend, urban, nostalgic and ecologic tourism”. Actions related to developing cultural tourism also include developing an events agenda and cultural routes.

In terms of specific policy agendas, understanding tourist behaviour was seen as most important, followed by diversification. Balancing promotion and protection of culture was seen as the third most important priority. More specific policy agendas tend to be ranked as less important. The most important concrete product was cultural routes but urban and rural regeneration and creative industries were seen as the lowest priorities.

There were clear links between the priorities for cultural tourism (figure 1.13) and policy agendas. In particular, those countries that prioritize product development and marketing also rank understanding tourist behaviour and diversification highly.

Figure 1.13 Priorities in policy agendas for cultural tourism, Member States responses



Note: 1 = low priority; 5 = high priority.

The general needs and priorities of many countries related to tourism and culture were reflected in the response from Costa Rica, who listed its primary needs as:

- 1. Developing public policy on cultural tourism;
- 2. Coordination among state institutions in defining cultural tourism objectives;
- 3. Developing specific statistics to measure cultural tourism; and
- 4. Providing budget for the development of cultural tourism.”

Some countries have also incorporated the challenge of balancing tourism promotion and cultural protection in their tourism policy. Myanmar’s main objective is to “prevent destruction damage of cultural heritage and natural scenic beauty due to the hotel and tourism industry”. In the case of Papua New Guinea a specific cultural challenge was mentioned in this regard:

“The [Papua New Guinea] Tourism Promotion Authority (PNGTPA)’s major challenge in cultural tourism has been aligning the modern or ‘Western’ concept of tourism as a business with the Melanesian cultural practices of shared resources and land ownership. Hence, PNGTPA works closely with tour operators, and tourism associations to help reinforce, support and preserve the local communities and their culture. Partnerships in tourism are vital for Papua New Guinea especially in the preservation of culture and the natural resources of a particular community. PNGTPA’s most successful partnership projects have been the Surf Management Plan headed by the Surfers Association of [Papua New Guinea] (SAPNG). This project aims to ensure the village communities where surfing tourism takes place receive shared benefits through fees and implement rules that limit the number of surfers to protect the environment.”

The response from Spain emphasized the role of regional and local government in regard to culture and heritage preservation and promotion. The division of responsibilities for tourism and culture across different levels of government make collaboration between these bodies essential, but this is also one of the major challenges for the future.

In some countries the close relationship between tourism and culture produces a legal as well as a marketing relationship. In Serbia, the “Law of Culture”

“[...] provides that the Strategy of development of culture in particular includes a chapter relating to the development of cultural tourism. Institutions of culture and tourism have become aware of the importance of cultural tourism development, primarily for the development of local communities, but also as an opportunity for networking with other countries in the region (through projects financed from [...] funds from the international cooperation organization), and they connected themselves. The development of these two sectors should be based on partnership, networking, collaboration, linking culture sector, but also the internationalization and decentralization of such forms in the Strategy”.

In many countries, therefore, there is a need to develop policies that provide a framework for collaboration among the different tourism and culture stakeholders as well as developing an understanding of cultural tourism itself. The following sections gather the key responses from the Member States in relation to issues such as measuring cultural tourism, balancing development and protection and marketing and promotion.

1.3.3 Statistics and measurement

Creating and exchanging information on tourism and culture was seen as a key need by many countries. There are a number of areas in which enhanced information can be useful, including awareness raising, development of new policies and products and providing statistics on cultural tourism.

For Spain “the priority of the country is to develop a specific policy pertaining to cultural tourism aimed at protecting and promoting cultural diversity in all forms both tangible and intangible and establish a system that captures the size of the cultural market of the country”.

Establishing the size and importance of the cultural tourism market can help to make different stakeholders aware of the need to develop and support policies in this area. Developing information for internal stakeholders was seen as particularly important for those countries facing challenges of heritage preservation. Local communities were identified by many countries as a key stakeholder group who needed to be given more information about the importance of preserving tangible and intangible heritage.

In Mexico, a need was identified for “promoting social and economic benefits of cultural tourism in host communities”.

In Venezuela there is a need to “strengthen the local and regional identity [and] respect cultural diversity to ensure the adequate usage of heritage”. Greater implication of local communities

could also be achieved by “designing tourist strategies that spread and position the various Venezuelan cultural events”.

Lithuania also pointed out the role of local stakeholders in product development:

“There should be more collaboration with local communities when it comes to cultural tourism development as vital component for efficient promotion of cultural tourism routes.”

Exchanging information with external parties was seen as more useful in creating and developing cultural products for tourism. Countries were keen to learn from those with experience in the development of cultural tourism, and to have opportunities to showcase their own achievements.

The development of statistics on cultural tourism was seen as a specific area in need of attention. This applies not just to the many countries that currently do not measure the relationship between tourism and culture, but even those with existing measures want to improve the quality and coverage of their statistical systems.

1.3.4 Balancing promotion and protection

Balancing the promotion of culture for tourism with the need to protect the heritage and cultural resources on which this tourism depends was identified as one of the major policy challenges by the Member States.

In Papua New Guinea a specific need was identified for policies to protect intangible heritage against the challenges of modern development:

“Culture is at the moment slowly dying away when the focus is into the modernity which has taken this age by storm. The evident of contemporary cultures are prevalent at cultural events but we cannot continue to abuse our cultural values. However, by integrating tourism into the promotion and preservation of cultures, it is the best possible [practice] to retain the authentic cultural values.”

The need for public support for culture was also linked to the current adverse economic conditions, as underlined in the case of Bosnia and Herzegovina:

“Institutions of culture, science and art in Bosnia and Herzegovina are in difficult financial, human resources and organizational condition and they require significant support of government institutions. Participation of non-governmental sector in the creation of cultural policies is important, but it is not enough supported by systematic measures and cultural policy.”

The potential to develop synergies between tourism and culture through policy measures were also identified by Italy, which aims to “promote a sustainable and virtuous tourism and culture policy where tourism is the main positive drive to enhance and value our amazing territory, beyond major destinations.”

Mexico sees a wide range of cultural tourism related objectives within its general tourism policy, which aims to strengthen the competitive advantages of tourism. Enhancing the preservation and conservation of tangible and intangible cultural heritage is seen as crucial to this overall aim. The strategies being pursued to achieve this objective in the field of cultural tourism are:

1. Develop schemes of coordination and competition;
2. Facilitate and align funding and investments in projects and initiatives in cultural tourism;
3. Promote training and professionalization;
4. Innovate and develop new tourism products;
5. Elaborate a sustainable Vision from an economic, social and environmental perspective; and
6. Strengthen mechanisms for promotion and marketing of products and destination.

Funding was also seen as a key issue for the balanced development of tourism and culture. Many countries are struggling to preserve their cultural heritage, and are looking towards partnership with other actors to provide potential solutions. A number of countries mentioned public-private partnerships as a priority in this regard. In addition, there are also problems of funding for the tourism sector, which is predominantly composed of small and medium enterprises. The difficulties of obtaining finance for these companies are seen as a major barrier to product development in many countries.

In some countries, such as Slovenia, the Ministry of Finance is specifically involved in tourism development and heritage finance. In other cases, such as many European Union Member States international finance sources may also be available. The development of synergies between different public and private bodies was also mentioned by a number of countries as an important priority for the future.

1.3.5 Community involvement

Involving local communities was also seen by many countries as vital for sustaining cultural heritage and making cultural tourism experiences more engaging. In Tanzania, local communities have been engaged in cultural tourism through the development of Cultural Tourism Enterprises (see box 1.7).

Box 1.7

Community-based cultural tourism in Tanzania

In the United Republic of Tanzania a specific programme of community-based cultural tourism development has been established. The Cultural Tourism Enterprise (CTE) programme facilitates local communities and their surrounding cultural attractions to participate direct in cultural tourism activities.

Cultural tourism adopts a community-based tourism approach in which the people are directly involved in designing, organizing tours and showing tourists aspects of their lives in the area they live in. While economic benefit is derived from this activity, some cross cultural exchange between visitors and the local people is also developed. Operated through the criteria of ownership of the activities undertaken and equitable distribution of the income generated are underlying factors of the programme. It is people tourism that enables tourists to experience the local people's way of life, offering insights into the values, beliefs and traditions in the host communities' own environments.

Currently there are over 41 Cultural Tourism Enterprises that Tanzania Tourist Board has helped establishing. Basically the CTEs operate as a total set of products that involve different cultural and natural attractions, activities and provision of services in a given local community. The CTEs provide employment and income generating opportunities to local communities in rural areas of

Tanzania hence decreasing rural to urban areas migration. There have been approximately 20% increases in arrivals yearly. Over the past 15 years Mto wa Mbu Cultural Tourism Enterprise has realized a tenfold increment in arrivals and revenues collected. Most CTEs focus on offering cultural experiences including: experiencing people's way of life, traditional dances/ceremonies, sampling of local cuisines, home-stays, daily homestead chores, handicrafts, community development initiatives, indigenous knowledge, historical heritage, nature walks, and local folklores. There are wishes for a geographical expansion and a diversification of the Cultural Tourism products to guarantee a further growth of Tanzania cultural tourism as an additional tourist product that will enhance tourism local economic impact and increase the length of stay of tourists in destination Tanzania.

Source: Tanzania Cultural Tourism Program (n.d.), *History* (online), available at: www.tanzaniaculturaltourism.com (16-11-2016).

Many other countries also reported initiatives that involve local communities. In India, heritage walks have been spearheaded by local people at important Cultural and Heritage sites.

These programmes are designed to:

- Encourage and provide necessary capacity building program for local community in and around important heritage monuments to come up with homemade souvenirs for enhancing their livelihood; and
- Create an enabling framework for adapting privately owned heritage structures for public use on a revenue sharing basis.

In Timor-Leste efforts are being made to develop and promote cultural tourism through handicraft development at local community level, promoting traditional dress via competitions, and providing small grants for local communities to rebuild their traditional houses.

Such programmes provide direct benefits for local communities involved in tourism, and give them the opportunity to show their culture to visitors.

Education is seen as an important part of the community involvement process as underlined by Serbia. The priorities include:

“Education of all interested parties in order to raise awareness level about the need and importance of cultural tourism development for the local community and increase of revenues from tourism, sector networking on horizontal and vertical level, the Strategy of cultural tourism development, creation of the Action Plan for the development of cultural tourism (these documents will inevitably require inter-sectoral and inter-departmental cooperation between culture and tourism).”

“We believe that an understanding of cultural identity, [educating] potential tourists, [...], strengthening local communities, [increasing] promotional activity and [developing] cultural routes at the national and international levels, contribute significantly to the development of cultural tourism and partnership of culture and tourism.”

Box 1.8

Community involvement in Cambodia – Artisans Angkor

An exemplary enterprise with the spirit of tradition at the heart of its full-circle initiative, acting as a vehicle for rebuilding the pride and productivity of the people of Cambodia, is Artisans Angkor.

Located in Siem Reap, the organization first came to life in 1992 as a vehicle for rebuilding the lives of Cambodians through the rebuilding of skills, jobs and hope. As explained by the organization: Artisans Angkor is a Cambodian company which was originally created to help young rural people find work near their home village. As the offshoot of an educational project called *Chantiers-Ecoles de Formation Professionnelle*, aiming at providing professional skills to communities with limited educational opportunities, Artisans Angkor has maintained its commitment to education by developing its own training program.

Over the years, Artisans Angkor has become a real showcase of Khmer workmanship for its silk fabrics and garments, stone and wood carving, lacquer ware, polychrome products, silver plating and silk painting. Not only does the company revive traditional Khmer Arts and Crafts but it also offers a collection of hand-made clothing and home furnishings fitted to contemporary lifestyles.

Artisans Angkor offers a wide range of high quality products that can suit every taste (see: www.artisansdangkor.com).

At present Artisans Angkor stretches out across the nation with 48 village-based workshops, and of the current 1,300 people employed, 900 are artisans. This represents approximately 90% of the total number of people trained by the organization and offered jobs, the remaining 10% going off to competitors or to pursue their own ambitions. 5% of the employees are technically classified as *disabled* by society, however this business is in the business of finding the gift of enablement in all of its students and employees, which they do beautifully, finding ability in great artistry.

Contributed by Ms. Anita Mendiratta, Consulting Advisor to the Secretary General of UNWTO.

1.3.6 Marketing and promotion

The high priority given to marketing and product development in cultural tourism is also reflected in the many activities being undertaken by the Member States in these areas.

A few countries mentioned the transition towards the experience economy as a specific issue that needed addressing. Jordan indicated that it wanted to review “the experiences of the leading tourist countries cultural development, and to benefit from their expertise”.

Malaysia identified the need to create cultural tourism content in terms of “meaningful authentic experiences” and to develop “unique products and customized experiences” that would provide consumers with “the ability to participate rather than observe.”

Taken together, these experiential elements seem to point to a desire to develop *creative tourism* style experiences. The emergence of new groups of tourists with a desire for more implication with the destinations they visit was also recognized in terms of the opportunities identified by Malaysia “to support good environmental and social responsibility practices”.

Mexico specifically mentioned new technologies as a means of developing new experiences:

“Leveraging the resources of digital technology to create value-added products and cultural tourism destinations. Promote and disseminate the heritage and cultural diversity as tourist attractions domestically and abroad.”

In terms of the specific types of experiences that countries are seeking to develop, cultural routes and events were particularly likely to be highlighted. Albania underlined the need to “increase

the number of accessible cultural sites [and to] improve the tourist infrastructure in these sites”. Mexico indicated that it would seek to “strengthen the competitive advantages of tourism in cultural destinations [and to] consolidate or create cultural tourist destinations (museums, archaeology, gastronomy, festivities, ethnic values and creative industries)”.

Box 1.9

Albania Cultural Tourism Marketing Strategy

Albania provides an example of an integrated cultural tourism marketing strategy, with a focus on cultural tourism and how to develop it further with inter-ministerial collaboration and other specific actions. The Culture Marketing Strategy for Albania is being prepared against a background to (and as a component of) the Joint UNDP – UNESCO Culture and Heritage for Social and Economic Development Programme.

The specific aspects that require to be upgraded in order to provide the necessary sound foundation on which the cultural heritage marketing strategy can be based with good prospects of success can be divided into two groups:

1. Development and Delivery Standards; and
2. Structural Reform and Strengthening of Institutions.

The latter requires strengthening both the Ministry of Tourism, Culture, Youth and Sports, and the National Tourism Agency.

A series of steps are proposed:

1. Establish a formal planning process, through close consultation between the two agencies;
2. Create a close and regular working system between the policy and implementation arms of government;
3. Grant the NTA greater responsibility and authority, and provide it with more and better trained manpower, and increased operating budgets; and
4. Create working advisory committees involving the Ministry, the NTA and the tourism private sector – possibly through the recently established Albanian Tourism Association.

1.3.7 Training and capacity building

In many countries there is also a need for capacity building to strengthen the marketing and delivery of cultural tourism experiences. Training in the area of tourism and culture was seen as a priority, particularly in emerging economies. Training is needed, in particular, for local communities and tourism sector actors. Mexico suggested there should be “training of local communities and increase their awareness about the preservation of tourist and heritage sites”. Papua New Guinea argued that “local tourism training and awareness is also important aspect to make the local people take ownership and participate to benefit from tourism developments”.

Other countries placed more emphasis on the need for training in the tourism sector. Liberia identified a “lack of training for workers and managers in the tourism sector of the Country” as a major weakness. Romanian tourism policy has the objective “to develop the provision of pre-vocational and vocational training for the hospitality sector so that curricula evolve to meet changing market needs and sufficient staffs are qualified to meet employment demand / fill employment vacancies”. In Israel there is “a strong emphasis on the training of tour guides and in providing them with continuing education throughout their career as tour guides”.

Training and capacity building can be supported through partnerships. For example in Costa Rica there are alliances between the Costa Rican Institute of Tourism and the Ministry of Culture, the National Training Institute, Ministry of Economy and private sector. In Panama a need was

identified for “private marketing, finance, product development, empower communities and local governments, and the public sector working together”.

In Fiji a need was identified for training and research on:

- Cultural tourism development and marketing;
- Policy formulation on cultural tourism;
- Cultural tourism exchange programmes; and
- Value of cultural conservation vs development.

1.3.8 Developing partnerships

Public-private partnership and inter-ministerial collaboration can stimulate synergies between tourism and culture and support innovation. However there are also other important outcomes of such collaboration. As noted in the response by Bulgaria:

“[...] an exemplary initiative of trans-national cooperation towards positioning the Danube region as a tourist destination by reducing the seasonality and preserving and giving value to natural and cultural (living) heritage is the *EU Cultural Routes* in the Middle and Lower Danube: *The Roman Emperors Route* and *The Danube Wine Route* project. The project activities are focused on developing an integrated communication and marketing strategy and an Action Plan for *The Route of Roman Emperors Route* and *Danube Wine Route*, creating networks of stakeholders along the route (national, regional and local administrations and tourism authorities, development agencies, private businesses, etc.), creating impulse for new trans-national and national private-private/private-public partnerships and designing/delivering high-quality marketing tools offering international visibility of existing and newly developed products for the cultural tourists.”

Spain underlined the marketing advantages that can be gained from inter-ministerial collaboration:

“[...] links between the Ministry of Industry, Energy and Tourism and Ministry of Education, Culture and Sport [...] are reflected in a Protocol for the international dissemination of cultural tourism. The Protocol supports the international promotion of: museums, the performing arts and music, cultural routes and cultural destinations, World Heritage Sites, manifestations of intangible cultural heritage, Study in Spain, Plató Spain (Spain as a destination for the filming of movies, series and ads international spread and for sightseeing to film scenes of our country)”.

Stronger links between the tourism and culture sectors and the involvement of more stakeholders in this relationship were therefore seen as a need by many respondents. The Democratic Republic of Congo listed the following priorities:

- Creating a new formal partnership between culture and tourism, although this link has been developed through joint projects, for example the slave route in the Central Congo;
- Harvesting and processing cultural tourism statistics over the whole Republic;
- Strengthening human capacities in cultural tourism;
- Developing and implementing integration projects on cultural tourism; and
- Strengthening bilateral and multilateral cooperation in cultural tourism.

Mexico also recognized that “for the development of cultural tourism, the first necessary step is linking with the cultural sector and [recognizing and exploiting] the value of Culture for Tourism as a basis for the development of activities for tourists.”

In Slovenia, specific steps are envisaged to develop tourism-culture synergies at national level:

“The Ministry, responsible for tourism will seek synergies with Ministry for culture in the future to promote closer cooperation between tourism and culture. Cultural tourism will be strongly included in the new Tourism Strategy for the period 2017–2021”.

For Timor-Leste, there was also a desire to develop partnerships with international organizations:

“There are several priorities of the government of Timor-Leste to develop cultural tourism in the area of local foods, traditional houses, local languages, arts, etc. and also it is so important to have partnership with other international organizations such as UNWTO, UNDP, UNESCO, and so forth”.

1.3.9 Technology and innovation

The use of new technologies to develop innovative relationships between tourism and culture did not feature strongly in the agendas of most countries. However, some countries have made specific efforts to develop new technology for cultural tourism.

In Poland the Ministry of Administration and Digitization is seeking to use technology tools and instruments for improving the quality of e-information systems and services in the tourism sector, as well as advanced electronic management systems for the development of tourism.

An annual competition is held for the award of the Best Tourism Product Certificate. The selection is carried out by an independent jury composed of experts representing the tourism industry, the media and cultural institutions. For tourists, the Certificate is a source of information that a given destination is unique and is characterized by a high quality and wide range of services.

A number of these projects have used new technologies to enhance the basic cultural tourism product.

In the *Footsteps of Kraków's European Identity* is a tourist route underneath the Main Market Square in Kraków. The project renovated the underground system of chambers and corridors underneath the main Market Square. It includes a number of archaeological and architectural attractions, exhibitions, a cinema and a room for multimedia presentations. The Glass Heritage Centre in Krosno is a tourist attraction offering live presentations of glass manufacturing and formation technologies, and the possibility for visitors to take active part in those processes. All facilities offer innovative multimedia presentations related to glass production. The newly extended and adjusted Art Exhibition building contains a room offering interactive presentations of glass melting technologies, as well as other exhibition rooms and a shop. The cellars located underneath the market square in Krosno have been adapted to house exhibitions presenting glass melting processes with the use of interactive techniques addressed, in particular, to the youngest visitors. The Interactive Centre of the History of the Ostrów Tumski Cathedral Island in

Poznań presents information of key importance for understanding the various cultural aspects of the history of the Cathedral Island, for conscious experiencing of the place and for appropriate interpretation of the related facts and symbols.

Israel has gained a reputation as a “start-up nation” thanks to its favourable climate for technology enterprises. As the OCED report on *Tourism and the Creative Economy* illustrates:⁶

“Tel Aviv is particularly attractive as a location for high-tech start-ups and between 2007 and 2011, 635 new companies were created. This creative and innovative profile has stimulated the city to profile itself as a “creative city” to make it attractive to “global creatives” and boost the economy, creative industries and tourism. The city has developed a “start-up” brand that emphasizes the innovative and welcoming aspects of the city, including the “non-stop” party culture and the gay scene”.

In Spain the Ministry of Industry, Energy and Tourism is collaborating with the Ministry of Education, Culture and Sport to promote its cultural products internationally. One of the measures foreseen is a joint project with municipalities and regions to ensure that smart cards adopt a similar format to facilitate their use by tourists.

Spain’s Culture Portal (www.spainisculture.com) aims to provide a comprehensive service to guide domestic and international visitors in experiencing Spanish Cultural Heritage. Managed by the Ministry of Education, Culture and Sport, the portal “Promotion and Dissemination of Cultures of Spain” gathers and presents the highlights of Spanish cultural heritage, the long history of cultural creation and the current offer of all kinds of cultural products. The portal provides three different and complementary perspectives: 1. geographic (by regions and localities), 2. temporary (art styles) and 3. thematic.

In Romania the “conditions for achieving the long term tourism vision of Romania” include developing the smart business environment. This implies “using cutting edge technologies at all levels”, particularly to attract the “discerning travellers [who] are experienced users of all kinds of technologies”.

In the case of Serbia a new profile of tourists has also been identified, with “trends towards independent, technologically aware tourists looking for authentic experiences, and active tourists interested in culture and natural resources of the destinations which they visit”.

These responses indicate that there is a lot of potential in the development of new technologies in the field of cultural tourism. As well as specific applications that can aid on-site interpretation or navigation around cultural attractions in the destination, there is also the potential to develop systems that make the large amounts of data stored by public authorities available to visitors. The development of new systems should also stimulate the local economy through the participation in the creation of new technologies by small- and medium-sized enterprises. In some countries there are specific funding schemes aimed at stimulating such developments.⁷

6 Organisation for Economic Co-operation and Development (2014), *Tourism and the Creative Economy*, OECD, Paris.

7 Ibid.

Innovation can be based not only on new technologies, but also through the renovation and updating of traditional culture, as the Fiji case study shows (see box 1.10).

Box 1.10

Fiji – the Made-Buy Fijian Campaign

The Fijian Made-Buy Fijian Campaign was launched in 2011 by the Fijian Government which provides a national brand. The Ministry of Industry, Trade and Tourism works closely with the Fiji Arts Council in identifying authentic Fijian Crafters and artisans and brand authentic Fijian handicrafts, whilst at the same time identify markets for crafts which include the tourism industry.

“I am proud to say that we Fijians have never lost our cultural heritage and have managed to maintain our uniqueness. In fact, our identity as a nation has never been stronger. Such events ensure that our tradition and culture are preserved and is passed down generation to generation.”

“This is where the Fijian Government’s *Fijian Crafted* brand, under the [...] Made-Buy Fijian Campaign fits in well. This initiative is a celebration of Fijian arts and craft and the artisans who make them. It is designed to ensure their continuity into the future and provide sustainable livelihoods for talented Fijians.”

“The Fijian Crafted brand is designed to differentiate our genuine Fijian crafts from the generic island style products imported from overseas. These non-genuine products that have been displacing our traditional, genuine arts and we are determined to change this.”

“Today, we have a large number of crafters who are licensed under the campaign. Through our logo, international visitors to Fiji can easily identify whether a particular item is authentically Fijian and truly represents Fijian craftsmanship and culture.”

“Furthermore, our Fijian Crafted logo has enabled our Fijian handicrafts to compete with other similar products in the market and through this branding strategy, help support livelihoods, create jobs and help micro and small businesses in the handicraft sector to grow.”

“The various crafts on display this morning symbolizes authenticity, quality, craftsmanship and uniqueness in skills of ordinary Fijians – the men and women who use their hands to create items of beauty – *masi*, mats, wood carvings, pottery, paintings, to name a few, all of which genuinely express the richness in Fijian culture.”

Source: The Fijian Government (2014), ‘Speech at the Opening of the Western Craft Fair 2014’ (online), available at: www.fiji.gov.fj (07-11-2016).

Chapter 2

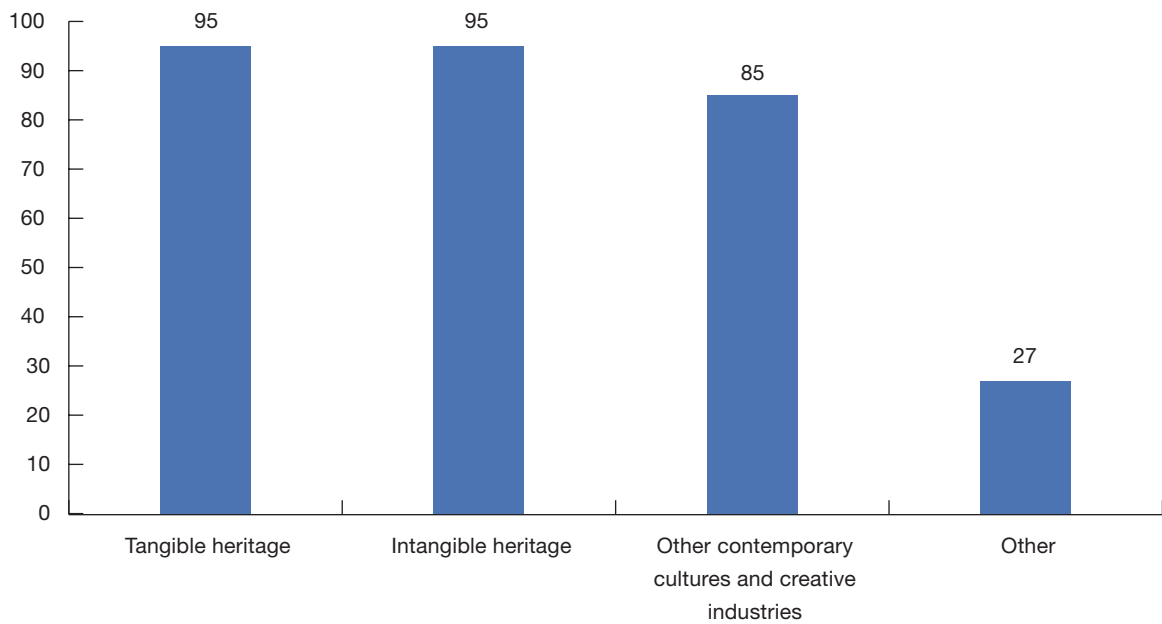
Survey of cultural tourism experts: views and comments

The aim of the expert survey was to provide more input for the analysis of the developing relationship between tourism and culture, and the opportunities and threats this entails. The experts were therefore asked their opinions on the definition of cultural tourism, the importance of and growth of cultural tourism sectors, policy options, challenges and opportunities. They were asked to respond in their individual capacity as experts rather than as representatives of organizations or countries. The experts were asked to complete an online survey, with ten questions covering issues such as the definition of cultural tourism, the importance of cultural tourism, the measurement of cultural tourism, expected cultural tourism growth, and views on cultural tourism policy priorities and challenges. Some of the closed questions replicated the questions posed to the Member States, but the emphasis in this survey was on collecting expert opinions. Most of the questions therefore included the opportunity to add additional information and opinions. The survey of cultural tourism experts attracted 61 responses from 97 invited experts (63%) from different world regions between December 2015 and March 2016. This is a relatively high response rate for a survey of this kind, and indicates the high level of interest in the relationship between tourism and culture.

2.1 Defining and measuring cultural tourism

When asked about the types of culture that could be considered as part of cultural tourism, the experts gave very similar responses to the Member States. Around 95% of experts classified tangible and intangible heritage as part of cultural tourism, but slightly fewer (85%) thought that contemporary culture should be considered (figure 2.1).

Figure 2.1 Areas to be included within the category of cultural tourism, experts' responses (%)



Notes: Multiple responses were possible.

Tangible heritage: e.g., national and world heritage sites, monuments, historic places and buildings, underwater archaeology.

Intangible heritage: e.g., handicrafts, gastronomy, traditional festivals, traditional music, oral traditions, religion.

Other contemporary cultures and creative industries: e.g., film, performing arts, design, fashion, new media.

Other: e.g., sports, education, health, shopping.

2.1.1 Definitions of cultural tourism

Just over a quarter of the experts mentioned another form of culture that they felt should be included. These ranged from outdoor shopping to food and protected natural areas.

Many of the comments made by the experts in relation to the elements of culture and heritage related to cultural tourism underlined the broad range of cultural resources of interest to tourists. One expert commented:

“Culture covers almost all aspects of life. Culture in its forms: intangible (values, norms, ethics concepts etc.), social behaviour (way of life), tangible (monuments). Culture in its components: religious practice, community organization, knowledge system, language, arts, livelihood, object and technology.”

The culture and heritage related to cultural tourism also includes many elements of the way of life of the place visited, as another comment indicates:

“Cultural tourism is all aspects which represent over-arching, and clearly defining, ways of life and lifestyle of a population both past and present, with implicit carry-forward into the future. Importantly, they go beyond the curio/arts and craft stereotypes to reflect aspects of identity, both visible and invisible, daily and special occasion. Ultimately, they are aspects which give the people of a nation/region a sense of identity, community, belonging and pride.”

In fact, in a broad sense “it is hard to see anything that is ‘not cultural’ – e.g., shopping, sports, health are all culturally specific. Perhaps one has to see what the tourists ‘think is cultural tourism’?”

For some of the other experts, however, there were limits on what types of culture should be included in the ambit of cultural tourism:

“Although it is important to adopt a definition of cultural tourism as inclusive as possible, fields like sports, education, health, shopping do not share the same values and philosophy than the cultural one.”

However, what might be seen as “culture” is also culturally-specific, as a couple of comments indicated:

“Sports as ‘cultural tourism’ is market-specific. For example, although hockey and American-style football are core representations of Canadian and [United States] culture in an anthropological sense, neither are – or would be – marketed in North America as cultural tourism experiences. However, for an Asian or African visitor to North America, hockey and American-style football are indeed cultural tourism experiences and should be marketed as such.”

“When we are considering the supply side, cultural tourism means all cultural aspects that can be seen, tasted, ‘touched’, smelled, heard... – anything that can be sensed by our senses – are cultural; but it may also seen from the culture of the tourists – the culture that tourists bring with them: the urge to shop of the Asian (Indonesian!), the urge to look for something to bring home as gift for their friends and relatives.”

The overall picture that emerges is a wide range of culture and heritage that can be linked to tourism. In common with the Member State responses, the experts tend to take a broad view, and in some cases the experts have an even broader scope in mind. One new area that they bring to the debate is the question of values. Some experts emphasized that what is seen as culture or heritage is culturally-specific, and therefore depends on the country or region concerned. But in addition the tourists bring their own values to cultural tourism experiences, and may therefore have a different interpretation of cultural or heritage resources than the local culture they are visiting.

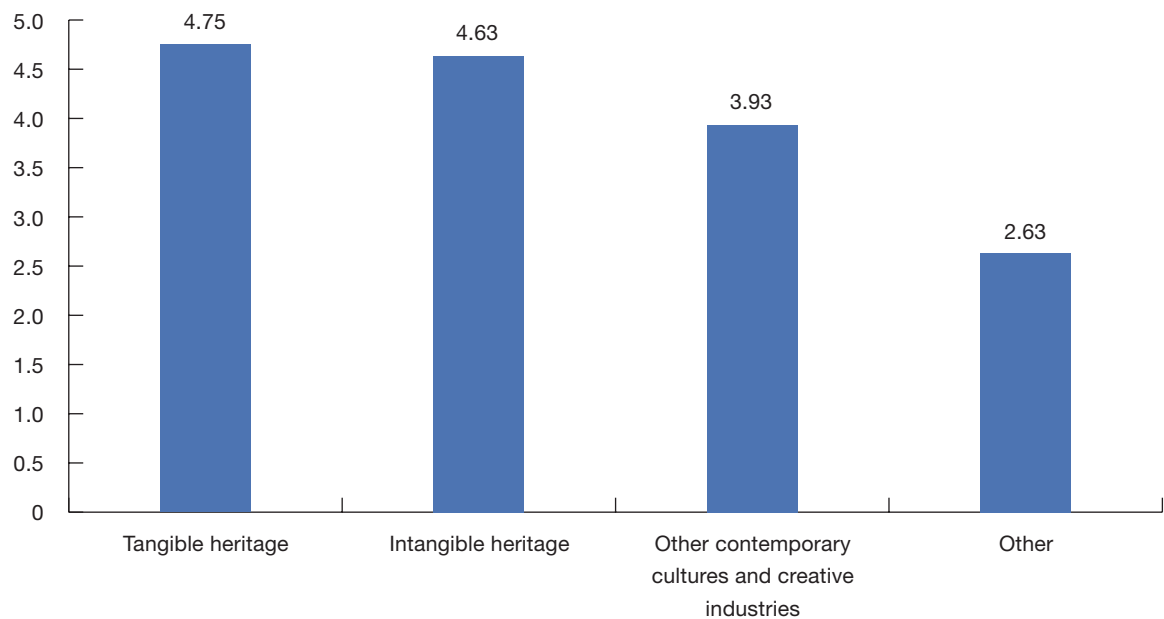
For some experts, however, there is also a feeling that there is a *core* of cultural experiences related to tourism, which is usually related to tangible heritage. Over time the core cultural tourism experience has expanded to cover intangible heritage and in many cases contemporary culture and creativity as well.

“Tourism is not any more limited to ‘sun and sea’ and since a number of decades it has expanded its interests to a large number of Cultural Heritage, in its large definition, including tangible and intangible heritage and showing more and more interest to creative industries as well as artistic creations.”

2.1.2 Importance of forms of heritage and culture

The experts were also asked to indicate the importance of the different types of cultural resources for cultural tourism. Tangible and intangible heritage were rated as most important by the experts, and contemporary culture was rated less important (figure 2.2). Other important elements of cultural tourism mentioned included sports tourism, protected natural areas, creative tourism and cultural industries. However many of the experts commented that the field of culture is very broad, and that many different types of tourism could therefore be related to cultural tourism.

Figure 2.2 Importance of different forms of heritage and culture, experts' responses



Note: 5 = high importance; 1 = low importance

Tangible heritage: e.g., national and world heritage sites, monuments, historic places and buildings, underwater archaeology.

Intangible heritage: e.g., handicrafts, gastronomy, traditional festivals, traditional music, oral traditions, religion.

Other contemporary cultures and creative industries: e.g., film, performing arts, design, fashion, new media.

Other: e.g., sports, education, health, shopping.

Again, some experts considered tangible heritage to be the most important element of cultural tourism, particularly in terms of awareness:

“Tangible heritage is the most prominent form of cultural heritage although in some places increasing emphasis is being given to intangible heritage. Contemporary heritage is still emerging and probably not considered by many at an industry/destination level to be a form of culture.”

Intangible heritage was also felt to be important, but then often in combination with tangible heritage. Intangible heritage was seen by some as a means of attracting visitors who have already seen the physical sites:

“Places with tangible heritage attract but only once unless the tangible heritage is like the Guggenheim with changing exhibits. But few people will travel across the world to see the Taj Mahal twice or the Alhambra. So cultural tourism as opposed to ticking off the site to see (sightseeing) has a lot more to do with the intangible which is more flexible than with the tangible which may represent the initial draw but alone will not produce loyalty or a deep bonding experience.”

Intangible heritage development introduces challenges of its own, because it requires more cultural capital from the visitors:

“Tangible heritage is well-known and unique, and has been popularized and marketed by various media and channels, while intangible heritage may help tourists have specific experience but needs basic knowledge. Others may interest only some specific market.”

Since intangible heritage and contemporary culture call for knowledge and skills from visitors to understand and enjoy them, interpretation becomes a key issue as cultural tourism develops in this direction:

“Place interpretation is not an attraction or experience, as such. Rather, it is the art of communicating the destination’s sense of place to prospective visitors, and to visitors who are already in-market. Place interpretation is important to the cultural tourism market because it:

- Highlights the destination’s cultural themes, which are revealed through themed routes;
- Connects the destination’s past and present, its achievers and achievements, its visions and visionaries, using narratives and stories; [and]
- Reveals the destination’s place attributes and heritage intangibles.”

Interpretation can be a means of linking heritage and culture to place and a way of developing a holistic experience for the visitor by connecting different elements through narrative and storytelling.

The experts generally felt that the demand for such experiences, based on a mix of different cultural and heritage resources and creativity would become more important in future. This is in part because of the symbiotic nature of the relationship between different elements of culture:

“A distinct symbiotic relationship exists between tangible and intangible heritage. As a result, as interest in tangible heritage grows, this will accelerate awareness and appreciation of intangible, which in so many ways represents the pervasive DNA of/within tangible culture and heritage-based travel experiences. Other aspects, such as film/arts/sports/education will, I believe, enjoy growth, but as niches within the greater tangible/intangible experience framework.”

For many experts the addition of intangible and creative elements to tangible heritage is part of a developmental shift from a high culture focus on major monuments and museums towards a more general desire for experience of place:

“All of these have the potential to increase in importance provided we move from a traditional, attractions-based approach to cultural tourism toward a holistic, place-based approach.”

But the type of experience desired in each place will also depend on the market(s) that they manage to attract:

“The major and more opulent part of tourists (or travellers) will opt for experiences, having seen and done it all, while the younger generations, who were previously backpackers and gap years, now more *voluntourists* and short stays (if lucky enough to be working) will opt for events, experiences, fun-packed thrills or spiritual chill-outs, integral packages or cultural bites. So creativity is what it's all about and will make or break your destination depending upon whether you use it or lose it.”

In general, however, the experts signalled the increasing importance of intangible culture and heritage:

“I think the recognition of intangible heritage will develop further, if authenticity can be shaped around and preserved with experiences. Contemporary cultural activities have the potential to be integrated into more complex cultural experiences, especially where these have a relationship to place.”

The development of more complex experiences integrating tangible and intangible heritage would also require new approaches according to one expert:

“A more holistic approach and further analysis of differentiation within and across destinations is appropriate before a realistic hierarchy can be established. From my perspective it is more a question of patterns of tourist cultural consumer behaviour matched by available cultural tourism opportunities at a destination. For example, a World Heritage archaeological site will focus on the tangible heritage, a spa town may focus on the intangible traditions of health tourism. University cities may have an emphasis on education per se, whereas the totality of cultural tourism experiences can be seen – to a greater or lesser extent – as learning experiences.”

Another expert also felt that tangible heritage was nearing the limit of the explosive growth in demand that has been seen in recent decades.

“Tangible heritage cannot increase a lot as it has been the most representative of cultural tourism for the last decades. Tourists moved to see the hotspots. Intangible tourism will increase significantly thanks to the new demand of experiences. Creative industries as well, are becoming aware of the possibility/needs, to reach a new target among the cultural travellers. ‘Other’ will increase depending on their own specific demand.”

There was also some discussion of the role of new technologies in relation to the changing role of heritage. Some saw the development of intangible heritage being supported by new technologies, particularly as an aid to interpretation. But others also underlined the role of new technologies for tangible heritage:

“Tangible heritage may be more easily viewed with increasingly advanced technology and media, and the new generations to come may pursue specific personal experience for their journey. As the entire world may soon enter into the mass tourism era, some popular cultural tourism resources should be well developed and capitalized, such as language learning (the Chinese after English, French, Russian...), food tourism, and the Chinese New Year celebrations – Chunjie –, after the Christmas Day [...]”

There was also some specific discussion of the role of shopping in cultural tourism. Some experts indicated that they did not see shopping as part of cultural tourism, but that nevertheless it can have an important influence on cultural tourism behaviour:

“Shopping in exotic locations is fast becoming a status symbol and an identity marker in many societies, particularly in Asia. For instance, one would go to Dubai for buying electronics related products, while a trip to Paris is essentially driven by the urge to buy fashion accessories [...]”

“Shopping will increase, but as I do not consider it a part of the cultural/heritage experience I keep putting it a low priority.”

“I think that shopping should be considered separately as it is becoming a central activity for cultural tourists and because it is very much related to the economic impact of cultural and creative tourism through tourism expenditure.”

However, for one expert, whether shopping could be included as part of cultural tourism depended on the type of products purchased:

“Concerning shopping, when the items purchased are locally or regionally produced, and are artisanal or otherwise handcrafted in nature, shopping is a cultural tourism experience. However, the purchasing of mass-produced consumer goods is not.”

Many experts felt unable to judge the size of the cultural tourism market – only about 60% gave an estimate, and many of these figures were approximate. For those that did offer figures the mean figure was 48%, slightly larger than the Member State figures. But the median figure was 40%, roughly the same as the Member State figures.

Looking back, over the past five years the experts felt that cultural tourism had grown, with half saying it had increased significantly (figure 2.3).

In terms of the future growth of cultural tourism, over half the experts felt it would increase slightly and 40% thought it would increase significantly (figure 2.4). This is a more positive future scenario than suggested by the Member States.

Figure 2.3 Cultural tourism growth in the past five years, experts' responses (%)

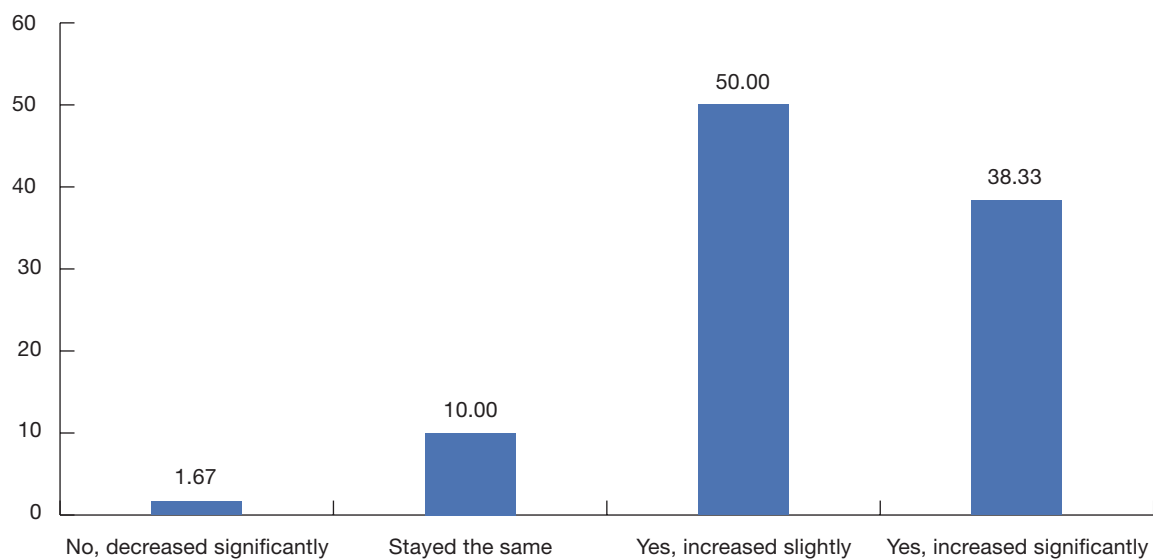
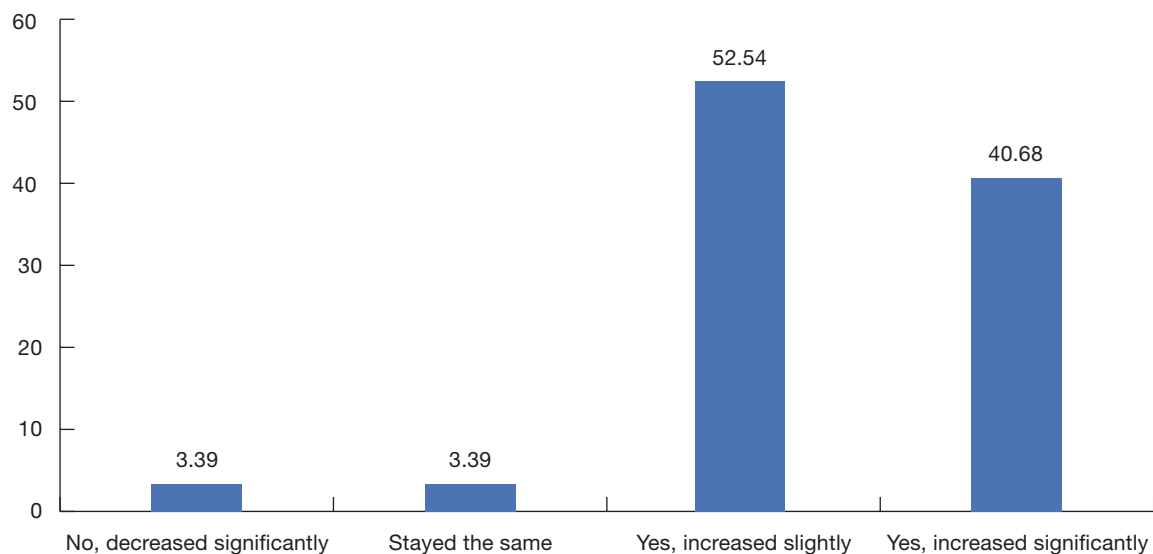


Figure 2.4 Cultural tourism growth in the next five years, experts' responses (%)



There was some discussion about the way growth should be viewed. Some felt that not all areas of cultural tourism have grown equally. Some particular segments or niches were singled out:

“Again the idea that traditional cultural tourism has stagnated, arguably new segments like creative tourism and orange tourism have been gaining more attention from destinations suppliers. This of course if we see these segments as new forms of cultural tourism.”

“I can only answer this question concerning the North American market. Yes, cultural tourism has grown slightly, primarily due to the exponential growth of culinary tourism, which is a core component of the cultural tourism market.”

“I work broadly in the small group adventure sector. This sector has been highly focused on cultural tourism activities for several decades. What has been noticeable over the past ten years is the continuous increase in demand for local, immersive, authentic, interactive cultural experiences. This is not only among niche operators, but now absolutely in demand by many of the biggest tour operators (in western markets), too.”

Looking towards the future, the experts were generally optimistic about the prospects for cultural tourism. Some felt that cultural tourism in general would continue to grow in line with the increase in international tourism. Nevertheless some particular niches were seen as good growth prospects:

“[...] the shift from observation to immersion in travel has, and will continue to, grow the understanding and appreciation of cultural tourism in its broader (sybiotically tangible and intangible) sense. This is magnified in emerging destinations (especially the Asian region) which offer, and are overtly positioning, culture as one of their key differentiators and reasons for superior experience delivery. Cultural Tourism allows destinations which may be lacking in *hard* infrastructure to compete not just effectively, but assertively and sustainably, with their *soft* infrastructure offerings, i.e., inviting culture, heritage and community.”

However, others noted that this growth would not be automatic, but would require innovation of experiences to capture growth:

“Cultural tourism will increase significantly if the industry adopts a place-based approach to destination planning for cultural tourism, and a place-based approach to destination marketing for cultural tourism. To the extent that cultural tourism clings to an antiquated, attractions-based approach to destination planning and marketing, cultural tourism will continue to grow, albeit more incrementally.”

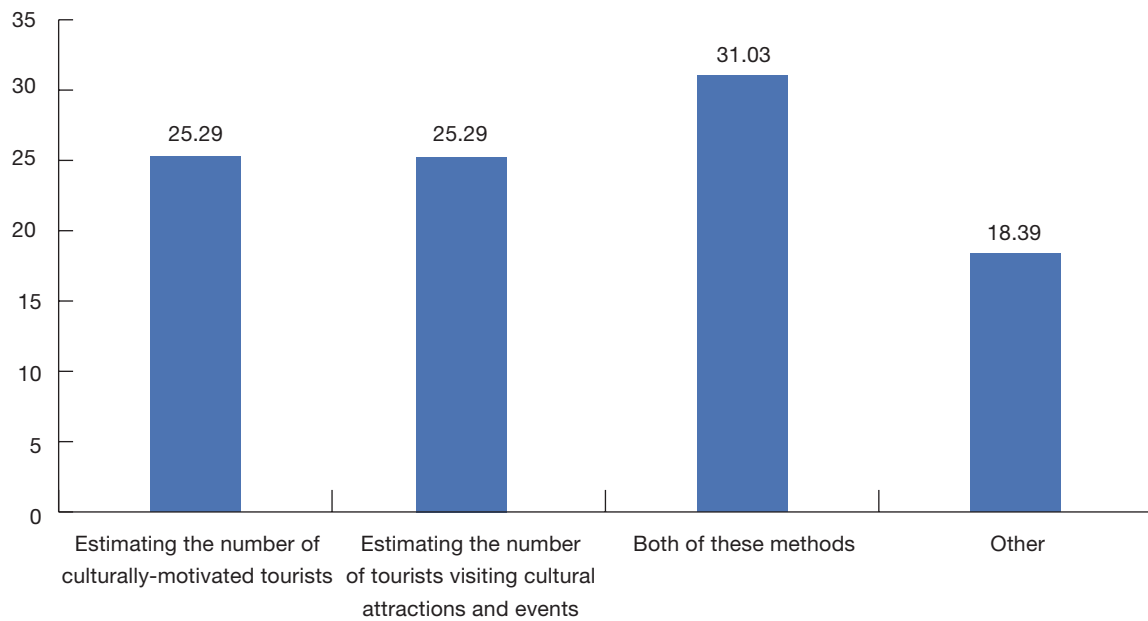
Asia and the Pacific in particular was identified as a key growth market:

“It depends on what part of the world we are considering. In South-East Asia [and] Asia Pacific, cultural tourism will grow. [...] Cultural tourism depends on the idea of other cultures being attractive and *inviting* [...]”

2.1.3 Measuring cultural tourism

When asked about the most appropriate ways to measure cultural tourism, there was a clear preference for combining different methods. Only about a quarter of experts indicated that a single measure of either cultural motivations or cultural activities was suitable, whereas a majority favoured using both methods (figure 2.5). This contrasts strongly with the current methods used by the Member States, as only about 17% of countries currently employ both types of measurement.

Figure 2.5 Most appropriate way to measure cultural tourism, experts' responses (%)



Note: Multiple responses were possible.

The problem for many experts in relation to judging the growth of cultural tourism is the method used to measure growth. As one noted:

“I consider the most valid measure of cultural tourism to be determined by motivation, not by participation, as such. Here, I am referring to leisure travellers who are predominately culturally oriented in their travel planning and consumption of tourism experiences, as distinct from leisure travellers who happen to consume cultural experiences in the context of mixed-itinerary trips. Although estimating the number of tourists visiting cultural attractions and events many have validity in economic impact assessments of cultural tourism, I consider *true* cultural tourists to be motivated primarily by cultural tourism experiences. As such, a leisure traveller who consumes a cultural tourism experience in the context of a mixed-itinerary trip is not, in my view, a ‘cultural tourist’ – no more than an adventure traveller who happens to visit a museum or gallery during a trip can be considered a cultural tourist.”

In view of these difficulties, some experts preferred not to give an estimate of cultural tourism market size or growth. For those that did offer estimation, this was often given with the caveat that it depends on the measurement method used. Different assumptions produced very different estimates. For example some used a very broad definition to estimate cultural tourism flows:

“I would say that the majority of [...] international tourists are in fact cultural tourists. We may only differentiate whether they are the *hard core* cultural tourists or the *softer* cultural tourist – I would say it should be close to 100%. Tourists should be advised not to visit any country if they are not interested to the culture of the places they are going to visit.”

“The estimation of 80% upwards is [...] based on the looser definition of cultural tourism, and therefore visitation would also include, for example, sport as an aspect of events, places of worship as attractions. Therefore, intangible immersion within tangible destination locations and communities per se being the broader scope of ‘cultural tourism’.”

On the other hand some experts maintained a narrower concept related to motivation:

“We have done a lot of work and when you ask the centrality of culture in trip decision, the deep cultural tourist comes out to about 5% or less.”

Other experts suggested that the size and growth of the cultural tourism market could be measured in terms other than numbers of visitors:

“It depends if it is domestic or international tourism. In Argentina, for example, 20% of domestic tourism is cultural. Please remember that not only the number of cultural tourists is very important, but also their impact in terms of expenditure and overnights at the country or local destinations. In some destinations, we could find that cultural tourism represents 25% in terms of number of total tourism arrivals, but 35% in terms of overall overnights, and therefore, a high proportion of the total expenditure of the tourism sector. (emphasis in the original)”.

In spite of the challenges, the need to measure cultural tourism was underlined by one expert:

“Being able to effectively, concretely, quantitatively and qualitatively measure Cultural Tourism across its wider tangible and intangible spectrum as a driver for tourism job creation, earnings, investment and community preservation would allow for the establishment of credibility and worth of the sector, making it possible to directly align Cultural Tourism to the Tourism Economy”.

2.2 Major challenges and suggestions in cultural tourism development

2.2.1 Future policy objectives

The experts ranked the development of integrated approaches to tourism and culture and community empowerment and inclusion as the main policy priorities for the next five years. The least important objectives of cultural tourism policy were seen as developing standardized regulations for cultural tourism and developing cultural routes. This also matches the relatively low priority given to cultural routes by the Member States (see table 2.1).

Table 2.1 Main objectives in cultural tourism policy in the next five years, experts' responses

Main objectives in cultural tourism policy	Rank
Integrated approaches to tourism and culture	1
Increase community empowerment and inclusion	2
Developing and supporting the creative industries	3
Developing better ways of measuring cultural tourism	4
Promoting cultural identity	5
Providing funding for cultural preservation	6
Diversification of destinations and activities	7
Promoting cross-cultural understanding	8
Developing cultural routes	9
Standardized regulations for cultural tourism	10

Note: 1 = high importance; 10 = low importance.

One of the issues highlighted by a number of experts was to ensure that future cultural tourism development should be sustainable.

“(I advocate) for the immediate enhancement of existing cultural tourism products so that they become sustainable. Then proceed with the development of new products.”

However, as some experts recognized, making cultural tourism sustainable is far from easy. This requires the implication of a range of different stakeholders, which increases the complexity:

“However, better advice on developing projects which impact upon local community development, developing sustainable capacity, etc. would open the door to a wider range of potential donors and agencies than those simply engaged in heritage conservation. Participation of local communities and training courses – developing culturally sensitive participation and training is a complex issue. There are some good models being developed in terms of governance models, creative capital, etc. and again it is better [...] to disseminate these approaches to enable agencies to explore alternative models would be very useful. The balance between short-term development and needs and long-term sustainability is again an issue here, and needs to be sensitively explored with an Agenda21 context. There is much to learn from environmental activities in this area.”

But there are possibilities for putting sustainability on the agenda in future:

“The United Nations declared 2017 as the International Year for Sustainable Tourism for Development. That initiative, if implemented across the globe will have a positive impact on the cultural tourism industry.”

The involvement of communities was also seen as an important step in increasing sustainability and linking cultural tourism to local culture and identity.

“Culture is a social product evolving from the engagement of people with their environments. For successful and sustainable cultural tourism it is a must that communities are included and empowered and benefitted from such tourism activities, otherwise they will only be a showpiece with no real change and in turn will not grow and influence more participation. Any external efforts may be directed to promote and position and market cultural tourism but it would be futile for the state to diversify destinations and activities as it can only regulate those – ultimately culture is to be produced by people and communities that live them.”

The involvement of local communities was also linked to the need for better planning and finding a balance between the needs of the community, heritage preservation and tourism:

“Finding the beneficial balance between tourism and cultural heritage management is the key challenge. This must involve better local participatory structures and practices, and needs to meet the challenge of assisting contemporary societies whilst maintaining the cultural resources for the future. Agenda 21 should lie at the core of decision-making. Internationally, we need provide more focus on capacity building, and the approaches to sustainable governance and management strategies.”

“Balancing promotion and protection is not new, however, it is very important yet difficult to be realized. It is a good trend in tourism administration in Asia that some countries have created a new ministry combining the culture and tourism sectors, helping to balance the functions properly.”

However, as one expert commented: “rather than balancing promotion and protection” there is a need to “focus more on protection”. Some experts specifically underlined the need to ensure the transfer of resources between different stakeholders in the tourism and culture sectors:

“In brief, more efforts should be made for new strategies for better planning of Tourism which is to become sustainable, beneficial to local communities, and respectful to cultural heritage which is a non-renewable resource. This is why part of the benefits from Tourism should be transferred to maintenance and enhancement of Heritage.”

Ensuring that a transfer of resources takes place implies a need for measurement of the flows of resources taking place. More than one expert emphasized that there is a need to measure more than just the number of cultural tourists:

“[The] measurement used will influence the way the (cultural) tourism is developed; when the number of tourist is the measure [...] all parties will go for it, sometime at all cost, disregarding the consequences. I do not see that regulations on cultural tourism need to be standardized; every country, event in our country every community may have its own *standard/norm* to be respected.

Priorities are:

- To improve sector statistics and the availability of real-time data (through big data?);
- To improve access to credit for [small- and medium-sized enterprises] in tourism and culture by developing new financial tools and evaluation systems;

- To create compensation mechanisms between tourism and culture (rethink Tourist taxes);
- [To] create awareness of the importance of tourism also for tourism businesses do not (in terms of communication channels, local brands etc.) and vice versa; [and]
- [To] create awareness and improve specific training for cultural tourism professionals.”

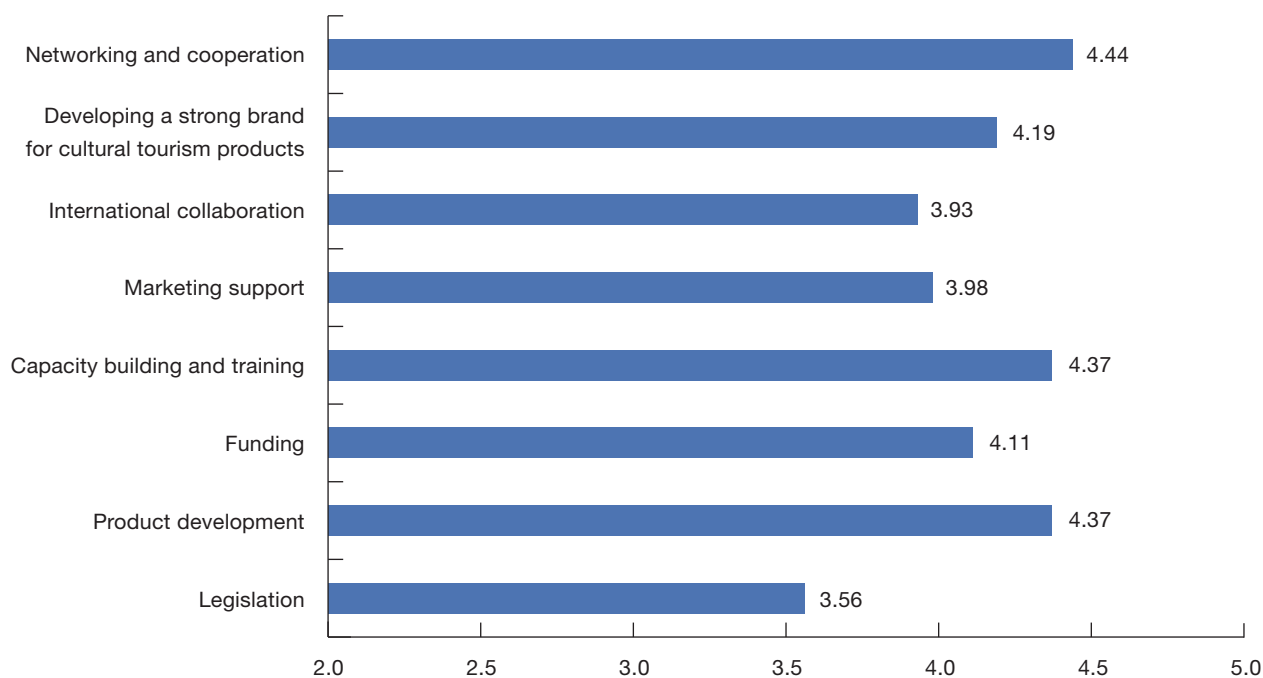
As one expert also commented:

“Developing better ways of measuring cultural tourism” is another priority. For many destination marketing managers who possess a limited understanding of culture, a more inclusive, place-based understanding of what constitutes “culture” would provide a greater impetus to invest in destination planning for cultural tourism and targeted cultural tourism campaigns.”

2.2.2 Support for cultural tourism: What can governments do?

A wide range of different types of support was seen as important by the experts. The two items that scored highest were community inclusion and empowerment and networking and collaboration. These factors underline the importance of working with a wide range of stakeholders to develop the relationship between tourism and culture effectively.

Figure 2.6 **Importance of types of support for cultural tourism development and tourism and culture partnership, experts' responses**



Note: 1 = low importance; 5 = high importance.

In terms of the types of support measures that the experts felt were important for cultural tourism, product development was rated highest (figure 2.6). This matches the priorities of the Member States as well. However, the experts then gave a higher rating to networking and cooperation and capacity building and training. This shows that the experts give more emphasis to broader support measures that are designed to build stakeholder networks and foster collaboration. On the other hand, legislation was rated lowest by both the experts and the Member State representatives.

In terms of the actions taken to support tourism and culture partnerships, the experts gave the highest priority to monitoring and setting shared goals. This is a logical combination, as monitoring is needed to ensure that shared goals are being met.

Funding was also commented on by a number of experts as an important issue.

“Securing funding and investors for projects (could be used to developing a tourism product, a marketing campaign, training local communities...). Various international, national and [European Union] level funding instruments provide opportunities for the development of different areas such as product development, innovation, training and strengthening business skills. Cultural tourism is rarely included as one of the focus points of these instruments, and the understanding of cultural tourism often varies between the institutions allocating the funding, making it more difficult to utilize the various forms of support.”

But securing funding is a complex issue, as another expert recognized:

“Securing funding and investors for projects – always problematic. However, better advice of developing projects which impact upon local community development, developing sustainable capacity, etc. would open the door to a wider range of potential donors and agencies than those simply engaged in heritage conservation.”

Widening the range of stakeholders involved would also lead to other challenges, however:

“Public-private partnerships needs a better mutual knowledge and practice of collaboration. That’s why it’s important to develop these mixed partnerships also at a small scale for local projects, in order to break down the barriers. Participation of local communities and training courses is essential for their empowerment as well as for the destination sustainability. This requires perceiving the specific needs and propose tailored courses that can be funded by the whole tourist sector, which will benefit from it in the short or middle-term. For all these issues, the question is to convince the tourist industry that it’s no longer possible to conceive the tourist sector as a short-term profitable one, but it’s of their interest to invest in training, preservation, etc.”

The development of public-partnership also needs to reflect the cultural context:

“Public-private is a contentious issue and depends upon local cultural norms and sensitivities. The crucial issue here is developing an effective legal framework for the process, which ensures effective monitoring and the balancing of short-term profit against long-term sustainability.”

If the cultural issues can be resolved then there are opportunities to move from top-down to bottom-up models of development:

“By making people aware of their heritage and the power of identity in tourism, the place they can occupy and the role they can have in shaping the same, by empowering and capacity-building on an intergenerational basis, things can begin to move bottom-up. And by using Corporate Social Responsibility to invest in people and places, making areas decent and safe to live in, quality (as opposed to investing in vertical buildings and gobbling up spaces), that investment will pay off and attract more growth and cultural vitality to areas badly in need of investment in people.”

A model for increasing the involvement of local stakeholders was suggested by one expert:

“Creating stakeholder fora in destinations, involving the most senior players with both power and influence across public and private sectors, and within such fora allowing a common agenda to evolve and thus a common framework for strategic interventions.”

The exchange of information and best practices was seen as important for the effective development of synergies between tourism and culture:

“By promoting best practices. By promoting the idea that the two components have symbiotic relationship (culture needs tourism, tourism needs culture). The non-renewable aspects should be highlighted. Placing culture at interface of various development agendas.”

“Experience exchange and good practice sharing is definitely important, especially for local community development. There is need for communities to be involved in the development process.”

Box 2.1

Rural cultural tourism in Germany

In Germany the Federal Ministry of Economic Affairs and Energy has commissioned a pilot project entitled “The Destination as a stage: How does cultural tourism make rural regions successful?” that seeks to deliver best practice and advice to those developing cultural tourism in rural areas.

The project will take place across three pilot rural travel regions and will seek to analyze specific problems on the ground. The key goal is to strengthen cooperation between the main attractions for tourists and those providing cultural activities. The best practice and experience gained in the pilot regions will then be available to be used by other regions across Germany. To support this process, there will be an online platform which will allow dialogue to take place on related matters.

Many experts also specifically mention capacity building as an area requiring attention:

“I think a key when working with local communities is to recognize the level of skills gaps, the time which is needed to build local capacity, and the need for experience, hands-on practice [and/or] on the job coaching to gain the skills needed to interpret [and/or] welcome guests, etc. In addition, especially when working with cash poor/ rural communities it is often not possible to focus only on culture. A holistic approach

is needed which identifies and recognizes urgent, locally defined needs alongside the cultural tourism agenda (e.g., water security and land access, education, etc.).”

Another expert suggested there is a need for more training in the area of new media:

“The use of new media is vital, but there is a great deal of wasted effort here – clear guidance and cutting-edge training and support would be useful.”

Top-down approaches and regulatory policies on the other hand were rated low by both the experts and the Member States.

Box 2.2

Ghana: developing a combined Ministry for Tourism and Culture

The realignment of the portfolio of culture and creative arts to the tourism ministry since 2013 is a major effort by Ghana's Government to promote cultural tourism as cultural issues are developed in collaboration with key stakeholders and practitioners including the national house of chiefs and traditional authorities.

In furtherance of this the Ministry for Tourism and Culture has created a good rapport and strengthened collaboration between the tourism private sectors and culture private sector represented by the Ghana tourism federation (ghatof) and Ghana culture forum. The two organizations are the apex bodies of the various tourism trade associations and the culture practitioners associations and groups.

2.2.3 Specific actions to support tourism and culture partnership

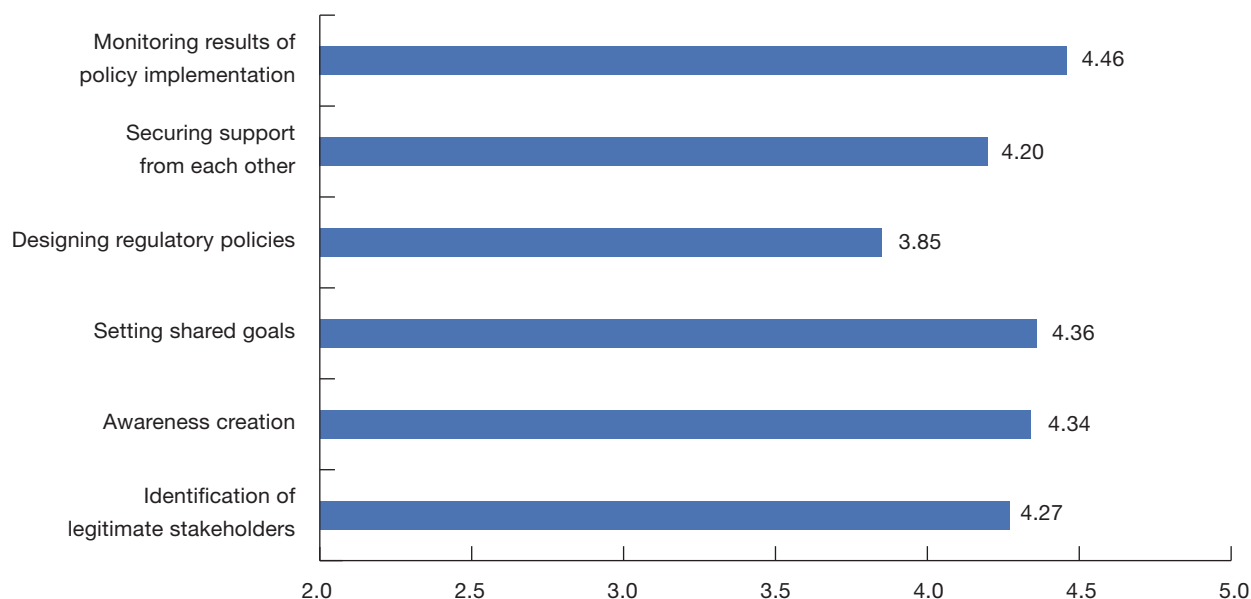
When the experts were asked to suggest specific actions needed to support tourism and culture partnership, they rated monitoring results and policy implementation as the most important (figure 2.7). Setting shared goals was rated second most important, indicating that once information on the development of cultural tourism is available it is important to agree the future direction of policy with stakeholders. Top-down approaches through the development of regulatory policies were seen as least important.

Box 2.3

Setting shared goals in Croatia

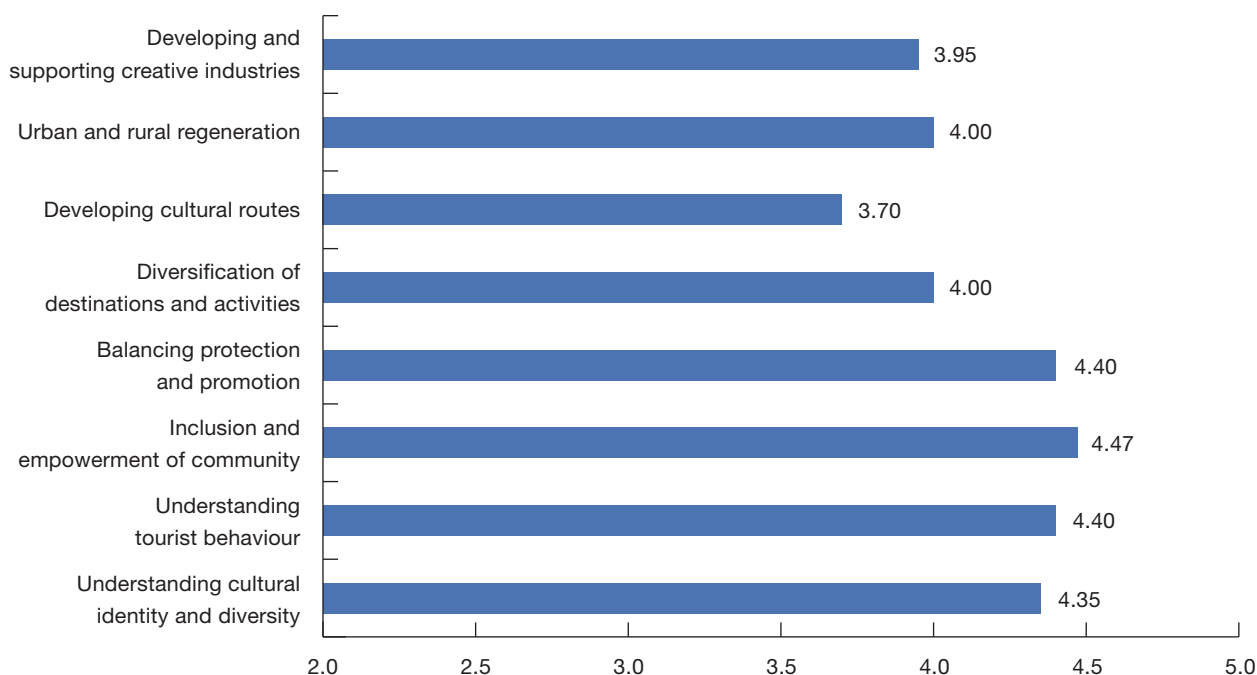
The Action Plan for the Development of Cultural Tourism was adopted in August 2015, as part of the implementation of the Tourism Strategy of Croatia for 2020. The aim is to establish a common development vision and agree on actions with the main stakeholders in the development of cultural tourism in Croatia. In addition, because the development of cultural Tourism is based on joint work and cooperation of cultural and tourism sector, the goal is to establish a Strategic and Operational Framework for Action with shared determinants from the field of culture and in the field of tourism. For Croatia, the relevant Cultural Tourism products defined in the Tourism Development Strategy of the Republic of Croatia by 2020 include: city tourism, heritage tourism, tourism events, creative tourism and religious tourism.

Figure 2.7 Specific actions to support tourism and culture partnership, experts' responses



Note: 1 = low importance; 5 = high importance.

Figure 2.8 Importance of following agendas in the cultural tourism development and tourism and culture partnership, experts' responses



Note: 1 = low importance; 5 = high importance.

In terms of policy agendas, balancing promotion and protection was seen as important (figure 2.8). The necessity for balance also implies that more needs to be known about the requirements of the most direct stakeholders: tourists and local communities.

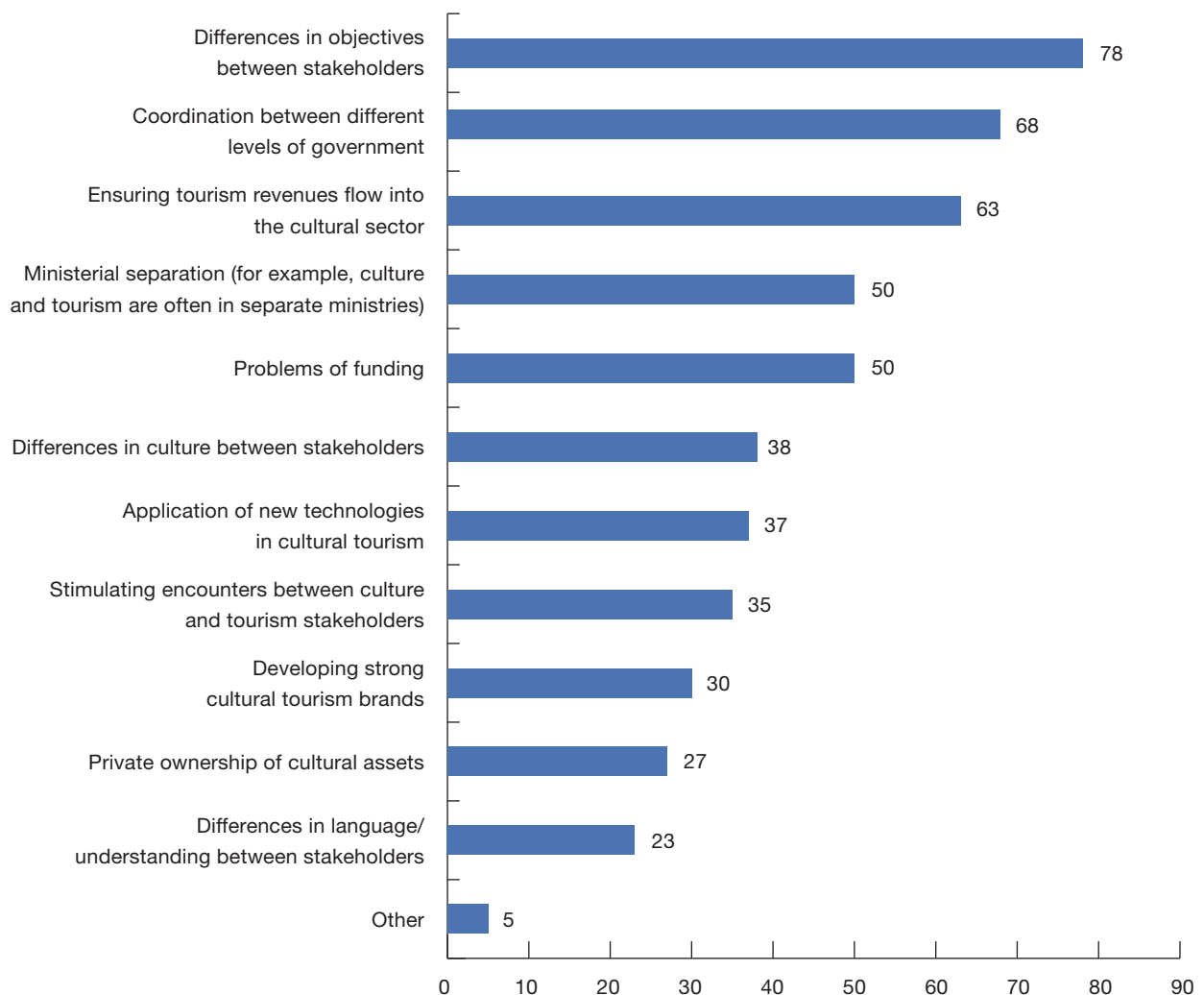
Balance requires a new approach to the problem:

“To create the same objectives that cultural tourism is using the product of culture but the same time preserving the culture itself.”

2.2.4 Challenges and barriers in tourism and culture collaboration

The main challenge identified by the experts was the different objectives of stakeholders in the tourism and cultural arenas (figure 2.9). This also makes it important to prioritize coordination between different levels of government, and ensuring that objectives are aligned by shifting resources from tourism into the cultural sector.

Figure 2.9 Main challenges or barriers to tourism and culture collaboration, experts' responses (%)



Note: Multiple responses were possible.

Developing public-private partnerships (PPP) was seen by a number of experts as a way of aligning stakeholder objectives:

“Regarding public-private partnership, it is first necessary to identify the stakes of each of the partners and make those stake central to such ventures – all parties should clearly state their objectives, expected benefits, and their role in working relationships. It is then the PPP models become successful. For instance, the *heritage hotels* and *palace on wheels* in the western state of Rajasthan are good examples of PPP.”

“Any future cultural tourism policy should take into account the progress made in working with the private sector, and answer questions on who pays for the marketing and promotion, who benefits most from cultural routes etc. We have moved from strategic issues and policy concerns to mainly heritage and cultural tourism management issues.”

“Understand more about the identity and diversity of the communities that host valuable assets, diversifying destinations, create a safety net with the design of routes to communicate destinations with a common heritage, are necessary steps that will help build a common agenda tourism and culture necessarily impact on further development.”

The needs of the community were also emphasized by a number of experts:

“We need more support and understanding for the needs of the communities in possession of heritage. Respect for their way of thinking and symbolizing the world, and their social activities.”

The experts do not see differences in language between the tourism and cultural fields as a major barrier. This indicates that there has been some reduction in the cultural differences between tourism and cultural stakeholders in recent years. Now the discussions revolve not so much about whether to have tourism or to allow commercial development, but rather over the objectives of such developments.

The need to bring stakeholders together was also highlighted in the comments from the experts. As one remarked:

“Unfortunately this is a particularly fractious community that more often competes internally than finding ways to collaborate for mutual benefit.”

The importance of collaboration is reflected in the fact that the four major issues identified (differences in objectives between stakeholders, coordination between different levels of government, ensuring funds flow into culture and ministerial separation) all relate to challenges of coordination between different sectors or organizational areas.

Another major challenge is to ensure the sustainable development of tourism and culture, which as one expert pointed out involves many different areas:

“When we understand the indicators or markers for sustainable tourism development which I think should be the only approach for any development related to tourism then I find all the above parameters as equally and highly significant.”

2.2.5 How can needs and priorities be addressed?

The types of measures advocated by the experts most often concerned the involvement of stakeholders and local communities.

“The most important issue is that the decision makers who are holding positions to manage the affairs related to tourism development are not oriented towards the new knowledge and concepts of what sustainable tourism means. More importantly they are least bothered about local communities and their participation. This is what I know out of my experience in India. The policy makers and officials have no background in handling the sensitivities of tourism phenomenon. Due to this all efforts pay no yield and rather a conflicting situation arises among the various stakeholders. We need to work upon disseminating knowledge and evaluate the same of those who are accountable for decision-making.”

“When clearly identified the actors who should be involved, have been set work objectives in common, it is achieved involving the public sector and the private sector, as appropriate, the necessary funding and community participation is obtained. Nothing will be solved yet, but without these conditions, much less.”

New approaches are needed that can help bridge the gaps between tourism and culture stakeholders:

“While marketing generally requires funding, there are many ways to use coordinated marketing campaigns to raise awareness, increase attendance, help raise funds (private and public), address policy and through “earned media” (public relations) a great deal can often be done with little money. But not-for-profit organizations and/or arts and culture groups often look down on the basic business practices that can help keep them alive. (Old story.)”

Again, planning is seen as important to this process:

“With the creation of strategic plans with aims, actions and results for a period of 3–5 years. Involving all the stakeholders and with local community participation, and promoting an associated training plan to reinforce the potential of cultural tourism for cultural and tourism actors from public, private and third sector, but also entrepreneurs. Universities also play an important role.”

Chapter 3

Trends and potentials: in-depth expert opinion

The results of the research carried out for this report underline the importance of the relationship between tourism and culture for countries around the world. Developing tangible and intangible culture and different forms of contemporary culture as part of the tourism product, and profiling these aspects of culture through tourism are generally high on policy agendas. The Member State surveys and the expert opinions also show the dynamic nature of the relationship between tourism and culture, and in particular the opportunities and challenges offered by the broadening concept of culture and heritage.

This section of the report provides a commentary on some of the major issues raised in the research, and provides links between these and the wider body of knowledge on tourism and culture.

3.1 The dynamic relationship between tourism and culture

The basic drivers of the convergence of tourism and cultural consumption in recent decades can be attributed to the growth in education and travel as a result of rising living standards in the developed world, and the more widespread use of culture for extrinsic as well as intrinsic motives. The report also identified the synergy between tourism and culture as one of the important drivers, with culture providing a major attraction for tourism, which in turn boosted the economies of the destinations visited. These synergies between tourism and culture have been instrumental in developing what was termed a *culture of tourism*¹.

The growth of postmodern culture and the increasing de-differentiation of different life spheres now mean that virtually all tourism can be seen as having a cultural dimension. Culture is increasingly less likely to be consumed on specific types of holiday or by specific types of people – it is now an integral part of many tourist experiences – either as a backdrop, a form of atmosphere, souvenirs, what people eat, etc. In this overall *culture of tourism* the division between tourism and culture is increasingly hard to discern, and the culture that tourists consume is increasingly integrated into the everyday life of the places they visit. As the tourism marketing strategy for Albania points out:²

“[...] cultural heritage is made up of the ways in which the population of a given location expresses itself in relation to its history, social systems, values, and their relationship with the environment in which they live. A location’s topography, ecosystems and biodiversity

1 Richards, G. (2001), *Cultural Attractions and European Tourism*, CAB International, Wallingford.

2 Tourism Development International (2010), *Albania Culture Marketing Strategy*.

cannot, thus, be divorced from the cultural heritage of the people who inhabit it. Cultural and natural heritage should be seen as part and parcel of the destination's total heritage.”

This integration of tourism and culture has proceeded through different stages of the transformation of both tourism and culture. In terms of culture and cultural tourism we can identify three basic phases of development over the centuries, as shown in table 3.1.

Table 3.1 Phases in the development of culture and cultural tourism

Phase	Culture ^a	Cultural tourism ^b
1.0	Culture 1.0: culture as by-product of industrial growth. Wealthy merchants and industrialists invested in culture as a means of polishing their image and/or doing good for the community.	Cultural tourism 1.0: Grand Tour, cultural consumption by a small elite.
2.0	Culture 2.0: culture as industry. With industrialisation and the growth of the culture industries, culture became an economic field, invested in by the public sector to stimulate growth and jobs.	Cultural tourism 2.0: mass cultural tourism, development of cultural resources as tourist attractions.
3.0	Culture 3.0: culture as a source of new value(s). The diversification of cultural taste, the fragmentation of cultural production and access to new technologies and media challenges the monolithic production of culture under Culture 2.0. Alongside economic value, culture is also seen as a means of creating identity, stimulating social cohesion and supporting creativity.	Cultural tourism 3.0: culture as a value platform for tourism (and vice versa), increasing integration of tourism and everyday life.

a) Sacco, P.L. (2011), *Culture 3.0: A new perspective for the EU 2014–2020 structural funds programming*, paper produced for the OMC Working Group on Cultural and Creative Industries.

b) Richards, G. (2014a), 'Cultural Tourism 3.0.: The Future of Urban Tourism in Europe?', in: Roberta Garibaldi (ed.), *Il turismo culturale europeo*, pp. 25–38.

The recent consolidation of Culture 2.0 systems, particularly in cities, saw synergies developing between cultural investment and tourism production. The creation of tourism flows in itself became the rationale for cultural investment, particularly as cities increasingly needed to re-position themselves in a globalizing economic field. Such developments were often justified in terms of the growth of cultural tourism, which was seen as the main economic driver for new museums, cultural quarters and events.³ Tourists would be attracted by culture, and their spending would in turn support investment in culture for tourists and residents alike.

Shortly after the turn of the century, however, cracks began to appear in this model due to the economic crisis. The previous urban tourism-culture growth machine began to be questioned because of a limited capacity to invest. From a cultural tourism point of view there was a particular issue linked to the limited flow of funds from the tourism system towards culture. Most of the economic benefits of the urban tourism-culture growth machine accrued to tourism,⁴ whereas the cultural sector, hampered by a view of culture as a public good that should be cheap, and a

3 Smith, M. (2007), *Tourism, Culture and Regeneration*, CABI, Wallingford.

4 Russo, A.P. (2002), 'The 'vicious circle' of tourism development in heritage cities', *Annals of Tourism Research*, volume 29, pp.165–182.

growing number of alternative tourism experiences, has not been able to capitalize economically on its ability to attract people to cities.⁵

The withdrawal of public funding for culture in many areas has hastened the development of the Culture 3.0 system, which is far more dependent on diversified commercial culture and market logic than the previous system. Supported by the growth of the Internet and related technologies, independent cultural and creative operators have begun to develop new cultural and creative products in the city. The result has been at least a partial retreat from the previously prevalent model of preserving or building tangible heritage for tourism.

Cultural tourism is beginning to shift away from museums and monuments. The turn away from tangible, historical heritage as the main theme of cultural tourism began in the late 1970s, and has continued to the present day. Some cultural tourism tour operators now build its products on four main themes:⁶

1. Modern life;
2. Culture and attractions;
3. Recreation; and
4. Responsibility (or sustainability).

The diversification away from the classic heritage-based product not only reflects the change in cultural supply (from Culture 1.0 to Culture 3.0), but also a shift in consumer demand.⁷ This shift also has synergies with the growth in cultural supply: the increased range of cultural attractions and experiences available put the cultural consumer in the driving seat – the consumer decided what was interesting.⁸ What the consumer found interesting from the 1990s onwards seemed to be *experiences*. In the early 1990s, the rise of the *experience society* was signalled,⁹ while this was followed by the *experience economy* concept in 1998.¹⁰ Contemplating culture or heritage alone was not enough for the experience consumer: the raw materials of culture had to be developed into holistic experiences through theming, animation, interpretation and packaging. The diversification of the tangible cultural products was therefore compounded by the production of experiences, making the problem of consumer choice even more acute. In many areas a form of *experience inflation* emerged, leading to the supply of cultural and creative experiences outstripping demand.

The ability of consumers to switch between different experiences and cultural forms led to the identification of the *cultural omnivores*.¹¹ The omnivorous consumer, particularly likely to have a higher education, tends to mix popular and high culture, with little regard for elitism or snobbery.¹²

5 Richards, G. (2001), *Cultural Attractions and European Tourism*, CAB International, Wallingford.

6 Kubsch, P.M. (2016), in: Kresta, E. (2007), 'Trümmertourismus war gestern', *ver.di Publik*, volume 08/09, Berlin, www.publik.verdi.de (30-06-2016).

7 Ibid.

8 Pröbstle, Y. (2014), *Kulturtouristen: Eine Typologie*, Springer.

9 Schulze, G. (1992), *Die Erlebnisgesellschaft: Kultursoziologie der Gegenwart*, Campus Verlag, Frankfurt.

10 Pine, B.J. and Gilmore, J.H. (1998), 'Welcome to the Experience Economy', *Harvard Business Review*, pp. 97–105.

11 Peterson, R. (1992), 'Understanding audience segmentation: from elite and mass to omnivore and univore', *Poetics*, volume 21, pp. 243–258.

12 Warde, A.W. et al. (2005), *Understanding cultural omnivorousness, or the myth of the cultural omnivore*, paper delivered to the European Sociological Association Conference, Torun.

This pattern has been identified in cultural tourism,¹³ although large-scale surveys still point to segmentation between consumers of high culture and popular culture-based tourism attractions.¹⁴ What seems to be happening is that there is increasing fragmentation of the cultural tourism audience into specialized niches,¹⁵ with many people using their holidays to explore specific areas of cultural life. One recurring theme in recent years, however, has been the tendency for cultural tourism to include elements of the everyday life of the destination, or what was classified as *modern life*.¹⁶

The desire to penetrate everyday life has also led to a renewed interest in different types of events. Studiosus offers trips to festivals, exhibitions and celebrations under the label *kultimer*, for example. This trend mirrors the general rise of events as important aspects of leisure and tourism as a whole.¹⁷

At the same time as cultural tourism has become more diversified and specialized, it has also continued to develop into a mass market. Whereas in the original Grand Tour culture was something consumed by the elite, today culture, even high culture, is an object of mass consumption. The cultural sights of Italy that were once frequented by a few travelling nobility are now the goal for millions of *mass cultural tourists*. Historic cities such as Venice and Bruges are overwhelmed by the numbers flooding to visit their treasures, and have made vain efforts to stem the flow of visitors.¹⁸ This development has led to a dichotomous development in the cultural tourism market, which is roughly divided between *mass cultural tourists* attracted to the main cultural sights and the more specific cultural tourists who often seek to avoid such sites of mass consumption.

In the UNWTO publication on *Tourism and Intangible Cultural Heritage*, intangible cultural heritage is defined as “practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artefacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals, recognize as part of their cultural heritage”.¹⁹ Growing attention for intangible heritage is linked to the growth of the experience economy. The publication recognizes the following forms of intangible heritage:²⁰

1. Handicrafts and visual arts that demonstrate traditional craftsmanship;
2. Gastronomy and culinary practices;
3. Social practices, rituals and festive events;
4. Music and the performing arts;
5. Oral traditions and expressions, including language as a vehicle of intangible cultural heritage; and
6. Knowledge and practices concerning nature and the universe.

13 Barbieri, C. and Mahoney, E. (2010), ‘Cultural tourism behaviour and preferences among the live-performing arts audience: An application of the univorous–omnivorous framework’, *International Journal of Tourism Research*, volume 12, pp. 481–496.

14 Richards, G. and van der Ark, L.A. (2013), ‘Dimensions of Cultural Consumption among Tourists: Multiple correspondence analysis’, *Tourism Management*, volume 37, pp. 71–76.

15 Richards, G. (2011), ‘Rethinking niche tourism in the network society’, paper presented at the ATLAS Annual Conference in Cyprus (online), available at: www.academia.edu.

16 Kubsch, P.M. (2016).

17 Richards, G. and Palmer, R. (2010), *Eventful Cities: Cultural Management and Urban Revitalisation*, Routledge, London.

18 Russo, A.P. (2002), ‘The ‘vicious circle’ of tourism development in heritage cities’, *Annals of Tourism Research*, volume 29, pp. 165–182.

19 World Tourism Organization (2012), *Tourism and Intangible Cultural Heritage*, UNWTO, Madrid.

20 Ibid, p. 3.

The report points to the many areas in which synergies can develop between tourism and intangible heritage, with a range of good practice examples, although the publication also recognizes the potential for conflict as well.

But in fact, because of the integration of tangible and intangible assets in tourism, the distinction between the two is often meaningless:

“The distinction between physical heritage and intangible heritage is now seen as artificial. Physical heritage only attains its true significance when it sheds light on its underlying values. Conversely, intangible heritage must be made incarnate in tangible manifestations, in visible signs, if it is to be conserved.”

Luxen, J.L. (2003)

Perhaps a more interesting distinction from the point of view of destinations is the distinction between movable and immovable heritage. Immovable heritage includes features such as monuments, buildings and sites that cannot be moved from their current location.²¹ The immobility of such features means that people have to travel to experience them directly. However, artefacts and objects that constitute movable heritage can travel to be consumed in other places, as increasingly happens with touring art exhibitions, for example. While immovable heritage may provide a basis for attracting tourists to a particular local, movable heritage can be used to promote the image of destinations in other places. Large cities now compete to stage *blockbuster* exhibitions that will generate tourism, often based on artworks loaned by countries keen to establish their own image abroad, as illustrated in the case of an exhibition of French art in Toronto²², Canada.

This brief review shows some of the complexities of the cultural phenomena that can be of interest to tourists. Culture can be categorized as ‘high’ or ‘popular’, or ‘tangible’ and ‘intangible’, as well as being divided into numerous fields, such as art, architecture, crafts, etc. The cultural content of tourism experiences is therefore very broad. The UNWTO/ETC publication on *City Tourism and Culture* identified four main types of cultural products and experiences involved in urban cultural tourism.²³

“Primary:

1. Heritage tourism (cultural heritage related to artefacts of the past);
2. Arts tourism (related to contemporary cultural production such as the performing and visual arts, contemporary architecture, literature, etcetera).

“Secondary:

3. Lifestyle (elements such as beliefs, cuisine, traditions, folklore, etcetera);
4. Creative industries (fashion design, web and graphic design, film, media and entertainment, etcetera).”

21 United Nations Educational, Scientific and Cultural Organization (1972), *Special committee of government experts to prepare a draft convention and a draft recommendation to Member States concerning the protection of monuments, groups of buildings and sites UNESCO House*, UNESCO (online), available at: whc.unesco.org (10-08-2016).

22 Carmichael, B.A. (2002), ‘Global competitiveness and special events in cultural tourism: The example of the Barnes Exhibit at the Art Gallery of Ontario, Toronto’, *The Canadian Geographer/Le Géographe canadien*, volume 46 (4), pp. 310–324.

23 World Tourism Organization and European Travel Commission (2005), *City Tourism and Culture – The European Experience*, UNWTO, Madrid.

3.2 Defining and measuring cultural tourism

3.2.1 Problems of definition²⁴

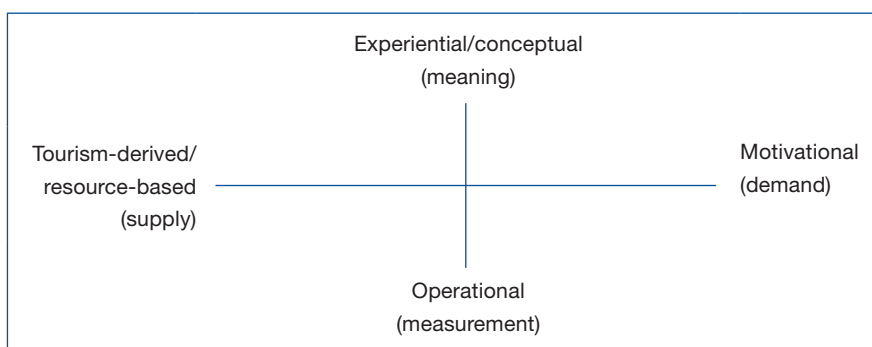
The increasing complexity of tourism and culture means that it is increasingly difficult to define something as ‘cultural tourism’.²⁵

“As the usual building blocks of tourism, such as the host and guest, supply side and demand side are increasingly merging, there is no such thing as – tourism just lying and waiting for us there to experience or research. Hence, there is no one specific tourism order with relatively clear boundaries. Neither is there a stable set of types of tourism available of, for instance, ‘urban tourism’, ‘creative tourism’ or ‘cultural tourism’.”

These challenges are reflected in the responses from both surveys. In particular the experts found it difficult to come up with a single clear definition of cultural tourism. This is because of the broad scope of cultural attractions and experiences and because of the increasingly intangible nature of many of these experiences. The fragmentation of cultural consumption by tourists and the diverse types of cultural consumers noted above makes this problem even more complex.

In previous studies two basic approaches have generally been taken to the definition of cultural tourism. The more conceptual approaches have sought to define the meaning of cultural tourism, usually linking it to the motivations of the tourists and their desire for learning or authentic experiences. More technical approaches to definition have tended to rely on the types of cultural attractions and sites visited by tourists, since this makes the identification of cultural tourists easier. The field of different types of cultural tourism definitions is illustrated in figure 3.1.

Figure 3.1 The definitional field of cultural tourism



Source: Richards, G. (2003), ‘What is Cultural Tourism?’, in: van Maaren, A. (ed.), *Erfoed voor Toerisme, Nationaal Contact Monumenten* (online), available at: www.academia.edu.

24 The survey was carried out prior to the official UNWTO definition of cultural tourism adopted at the twenty-second session of the UNWTO General Assembly in Chengdu, China (11 to 16 September 2017), as follows: “Cultural tourism is a type of tourism activity in which the visitor’s essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination. These attractions/products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions.”

25 van der Duim, R. (2016), ‘Foreward’, in: Russo, A.P. and Richards, G. (eds.), *Reinventing the Local in Tourism: Producing, Consuming and Negotiating*, Channel View Publications, Bristol, pp. 16–17.

A division between operational and meaning-related definitions was made by UNWTO in 1985, which adopted a broad (or conceptual) and a narrow (technical) approach:²⁶

- **Broad definition:**
“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.”
- **Narrow definition:**
“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.”

The Association for Tourism and Leisure Research and Education (ATLAS) also adopted two different definitions, one technical and one more conceptual.²⁷ The conceptual definition is:

“The movement of persons to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs.”

The technical definition, oriented towards measuring cultural tourism is:

“All movements of persons to specific cultural attractions, such as heritage sites, artistic and cultural manifestations, arts and drama outside their normal place of residence.”

An example of a conceptual definition adopted by a national tourism office (NTO) to delimit cultural tourism came in 1997 from the Australian Office of National Tourism:²⁸

“Cultural tourism is tourism that focuses on the culture of a destination – the lifestyle, heritage, arts, industries and leisure pursuits of the local population.”

Similarly, the White Paper on Cultural Tourism of the United States of America defines cultural and heritage tourism as “travel directed toward experiencing the arts, heritage, and special character of a place.”²⁹

These definitions allow people to understand what cultural tourism is, and what cultural tourists do, but it is not very amenable to measurement.

26 World Tourism Organization (1985), *The State's Role in Protecting and Promoting Culture as a Factor of Tourism Development*, UNWTO, Madrid.

27 Richards, G. (1996a), *Cultural Tourism in Europe*, CAB International, Wallingford, p. 26.

28 Australian Office of National Tourism (1997), *Fact Sheet No. 10 – Cultural Tourism*, Australian Office of National Tourism, Canberra.

29 President's Committee on the Arts and the Heritage (1995), *Cultural Tourism in the United States*, PCAH, Washington DC.

Some NTOs have therefore adopted narrower, technical definitions to aid measurement. For example NBTC Holland Marketing defined cultural tourists as:

“Foreign visitors for whom a museum visit was the most important activity during their holiday in the Netherlands”.³⁰

Using this definition, 6% of international tourists were classified as ‘cultural tourists’, even though 41% of international tourists made a museum visit. This highlights the enormous difference between defining cultural tourism in a specific (narrow) way or a general (broad) way.

In Mexico, a comprehensive study of cultural tourism in the country adopted a motivational definition, asking tourists whether they have been motivated wholly or in part to visit the destination because of culture.³¹ The results indicated that only 5.5% of domestic tourists and 3% of international visitors were solely motivated by culture. However, when tourists with a secondary cultural motivation were included, 41% of domestic and 40% of international tourists could be viewed as ‘cultural tourists’, and 47% of all tourists undertook some form of cultural activity during their stay. This research also indicated that specific cultural tourists stayed longer and spent more than other groups of tourists.

Even when a more technical or narrow approach is taken, there are difficulties in measuring the volume of cultural tourism. For example, not all cultural sites, attractions or experiences count their number of visitors. Many cultural attractions, such as cultural landscapes, for example, are open and free to visit, and very rarely count visitor numbers.

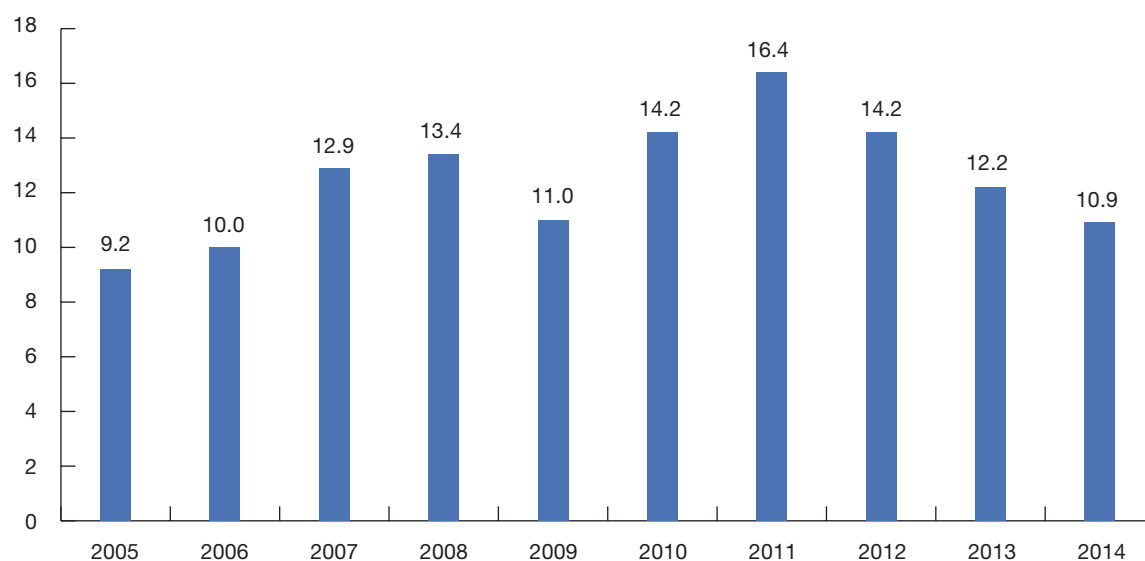
The difficulties are illustrated by the recent experience of Spain, where the study of cultural tourism includes analysis of surveys undertaken with domestic and foreign tourists. These indicate that the number and proportion of trips taken by inbound tourists for ‘cultural motivations’ has fallen sharply in recent years, from a peak of over 9 million in 2011 to 7 million in 2014, while the volume of domestic cultural tourism trips has remained almost static over the same period (figure 3.2).

In spite of this apparent fall in ‘cultural tourism’, figures on museum attendances indicate that museums in Spain increased their visitor numbers by over 4% during the period 2010–2014. Much of this growth was due to tourists, who make up a large proportion of the museum audience in Spain. The difference between the apparent fall in cultural tourism and the growth in cultural consumption is explained by the fact that in recent years the proportion of tourists undertaking cultural activities has increased (figure 3.3). In other words, a *narrow* measure based on specific motivations shows a decline in cultural tourism, whereas a *broad* measure based on cultural activities shows an increase. This underlines the importance of definitions in analysing the relationship between tourism and culture, and the difficulties in trying to identify ‘cultural tourists’.

30 NBTC Holland Marketing (2015), *Cultuurtoerisme in Nederland*, Nederlands Bureau voor Toerisme en Congressen, Den Haag.

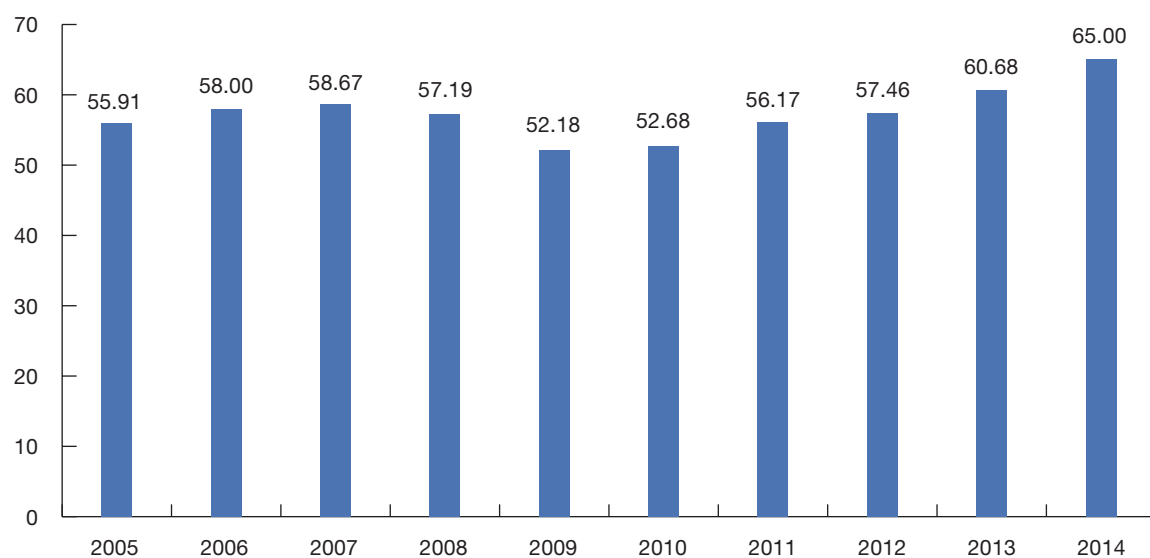
31 Secretaría de Turismo (2002), *El Turismo Cultural en México*, SECTUR, Mexico.

Figure 3.2 **Proportion of international tourists travelling to Spain for cultural motivations, 2005–2014 (%)**



Source: Ministerio de Industria, Energía y Turismo (2016), *FRONTUR: La encuesta de movimientos turísticos en fronteras*, Ministerio de Industria, Energía y Turismo, Madrid.

Figure 3.3 **Proportion of international tourists undertaking cultural activities in Spain, 2005–2014 (million)**



Source: Ministerio de Industria, Energía y Turismo (2016), *FRONTUR: La encuesta de movimientos turísticos en fronteras*, Ministerio de Industria, Energía y Turismo, Madrid.

3.2.2 The size of the global cultural tourism market

“The assertion that cultural tourism is growing seems to have taken a strong hold with tourism professionals across Europe.”

Richards, G. and Bonink, C. (1995)

One of the reasons for this belief was the widely-quoted statement that the “World Tourism Organization has estimated that 37% of all trips have a cultural element and that the growth rate in trips of this kind to the end of the century will be 15% annually”.³² UNWTO estimated the cultural tourism market based on research and academic studies of various organizations and institutes from the early 1990s onwards and placed the size of the cultural tourism market at around 40%. These studies did not have the backing of a global survey to support this figure. However, the estimation that cultural tourism accounts for around 40% of the global tourism market, as reflected in the Member State and expert surveys, does seem to have other empirical support. If we take figures from different national and international sources there seems to be widespread evidence that around 40% of international tourists undertake some form of cultural activities during their travel. For example, the OECD report on the *Impact of Culture on Tourism* indicates that 50% of European tourism and 50% of tourism from the United States of America to Canada was culture-related.³³ A study by Price Waterhouse Coopers also suggests that cultural tourism accounts for between 28% and 39% of tourism expenditure in leading tourism economies in Europe (table 3.2).³⁴ These data also suggest steady growth in cultural tourism turnover, although the rate of growth is no greater than for the tourism economy as a whole in the period 2005–2008.

Table 3.2 The contribution of cultural tourism to GDP and tourism turnover in Europe, 2008

Country	Cultural tourism as a proportion of GDP	Cultural tourism turnover as from the total tourism economy (%)	Annual growth in cultural tourism turnover (%)
Spain	7.4	38.9	8.2
Italy	3.5	33.2	4.9
Germany	3.3	33.0	9.1
France	3.4	30.7	5.4
United Kingdom	3.0	28.2	8.1

Source: adopted from Price Waterhouse Coopers (2009), *Arte, turismo culturale e indotto economico*, PWC, Rome.

Evidence for the growth of cultural tourism is harder to find, because fewer studies are taken longitudinally. The U.S. Department of Commerce reported that the volume of domestic ‘historic/cultural travellers’ grew from 192.4 million person-trips in 1996 to almost 217 million person-trips

32 Bywater, M. (1993), ‘The market for cultural tourism in Europe’, *Travel and Tourism Analyst*, volume. 6, p. 32.

33 Organisation for Economic Co-operation and Development (2009), *Impact of Culture on Tourism*, OECD, Paris.

34 Price Waterhouse Coopers (2009), *Arte, turismo culturale e indotto economico*, PWC, Rome.

in 2002.³⁵ Further research showed that the United States of America had nearly 15.4 million overseas cultural heritage travellers in 2010. Between 2004 and 2010, the proportion of travellers undertaking cultural heritage activities increased from 68.7% to 71.2% of all overseas visitors.³⁶ The European Commission *Eurobarometer* studies seem to indicate that specific cultural tourism has grown in Europe in recent years, with the proportion of European tourists having culture or religion as their main motivation growing from 6.8% in 2008 to 10% in 2014.³⁷ Surveys of tourists undertaken at cultural sites in different parts of the world by the Association for Tourism and Leisure Research and Education (ATLAS) indicate a growing proportion undertaking 'cultural holidays', up from 17% in 1997 to over 30% in 2007.³⁸ The figure rose further to 32% in 2008, and subsequent ATLAS surveys have recorded levels varying between 21% and 41%, depending on the location.³⁹

In Italy, data on the number of tourists visiting *art cities* have been monitored since 1990. These figures show that the number of tourist overnights grew from over 43 million in 1990 to 77 million in 2002 and 100 million in 2013, a growth of over 132%. In comparison, over the period 1990 to 2013, total inbound tourism to Italy only grew from 26.7 to 47.7 million or a growth of 78%⁴⁰.

Long term monitoring of tourism in the Romanian city of Sibiu also provides some indications of the long-term developments in cultural tourism demand.⁴¹ Sibiu was European Capital of Culture (ECOC) in 2007, when visitor numbers increased significantly compared with 2006. There followed a decline in total tourism flows in the immediate post-ECOC period, but since then total tourism and culturally motivated tourism has grown considerably. Surveys indicate that between 2007 and 2015, the proportion of visitors to Sibiu for a cultural holiday grew from 17% to 23%, which implies a growth in absolute numbers from under 48,000 staying visitors in 2007 to almost 100,000 in 2015 (figure 3.4).

The growth of cultural tourism in Sibiu was particularly important for foreign tourists, 40% of whom usually took cultural holidays in 2015, compared with 30% in 2010. The growth in foreign tourists has caused a steep growth in tourism revenues as well. The Sibiu data also indicate a growth in cultural tourism in general, since the proportion of survey respondents usually taking cultural holidays (to all destinations) grew from 30% to 40% between 2010 and 2015 (figure 3.5).

35 U.S. Department of Commerce (2005), *A Position Paper on Cultural & Heritage Tourism in the United States*.

36 U.S. Department of Commerce (2011), *Cultural Heritage Visitor (CHV) Profile*. Washington DC: Department of Commerce.

37 European Commission (2014), Flash Eurobarometer 392, *Preferences of Europeans Towards Tourism*, European Commission, Brussels.

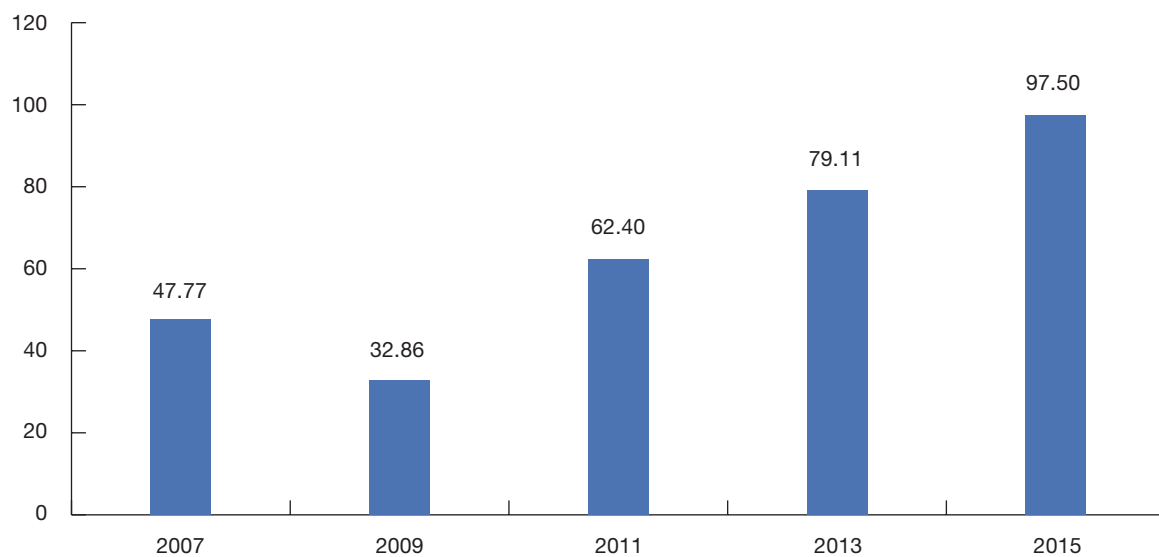
38 Organisation for Economic Co-operation and Development (2009), *Impact of Culture on Tourism*, OECD, Paris.

39 Richards, G. (2015), *ATLAS Cultural Tourism Report 2008–2013*, ATLAS, Arnhem.

40 Centro Studi Turistici di Firenze (2013), *Turismo nelle città d'arte d'Italia*.

41 Richards, G. and Rotariu, I. (2015), 'Developing the Eventful City in Sibiu', *International Journal of Tourism Cities*, volume 1 (2), Romania, pp. 89–102.

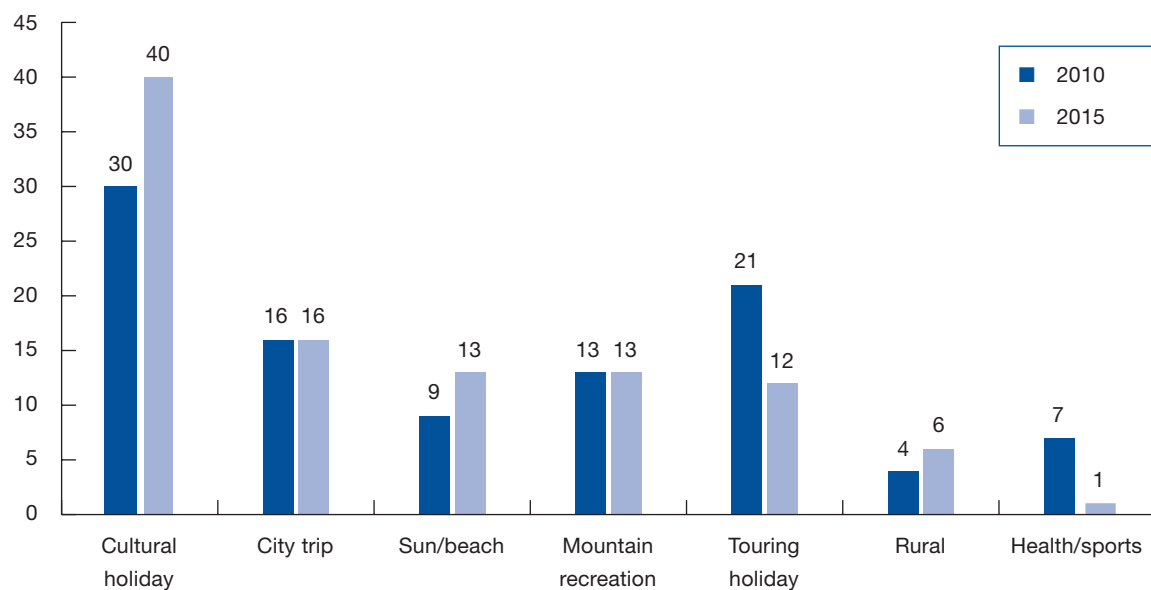
Figure 3.4 Cultural tourism overnights in Sibiu, Romania, 2007–2015 (× 1,000)



Sources: Richards, G. and Rotariu, I. (2016), *Long-term effects of the European Capital of Culture*, ATLAS, Arnhem; and

Richards, G. and Rotariu, I. (2013), 'The impact of cultural events on tourism development: The European Cultural Capital', *Annals of the Constantin Brancusi University, Economy Series*, pp. 6–12.

Figure 3.5 Usual holiday type for foreign tourists in Sibiu, Romania, 2010 and 2015 (%)



Sources: Richards, G. and Rotariu, I. (2016), and Richards, G. and Rotariu, I. (2013).

3.2.3 Cultural tourism typologies

The review of previous studies of cultural tourism indicates the great diversity of the field, the issues of definition and the resulting problems of measurement. Even if definitions can be agreed, operationalizing these into a measurement system is challenging. The indications are that a single homogenous phenomenon of 'cultural tourism' is elusive. Many studies have therefore been conducted of the profiles, motivations and behaviour of tourists consuming culture attempting to identify different groups. In some cases these data have also been used to develop typologies of cultural tourists.

Comprehensive research on cultural tourism began in the 1980s, and burgeoned in the mid-1990s as tourist demand for culture was seen to increase. Early studies tended to concentrate on the motivations and profile of visitors to cultural sites. The growing link between tangible heritage and cultural tourism was cemented in 1988 by an Irish Tourist Board study for the European Commission, which produced an inventory of cultural tourism resources in the European Union and divided the market into *specific* and *general* cultural tourists.⁴² The categories of specific and general cultural tourists were then operationalized in the ATLAS research.⁴³ Another research identified two main types of cultural tourists. The *special interest tourist* sees cultural tourism as serious leisure, whereas the general cultural tourist makes a hobby of visiting cultural locations.⁴⁴ The idea of different levels of cultural motivation was also developed by other authors who identified *culturally motivated*, *culturally inspired* and *culturally attracted* segments of the tourism market;⁴⁵ or developed a model covering four levels of cultural tourism involvement, ranging from the *greatly motivated* (1) tourists travelling especially for culture to the *partly culturally motivated* (2), the *accidental cultural* tourists (3) and finally the *non-cultural* tourists (4).⁴⁶

Box 3.1

Integrated approaches to theming and segmentation

The Czech Republic has divided cultural tourism into a number of thematic storylines: Prague; City with a story (UNESCO etc.); Cultural landscape (areas outside the city); Trips with a story (spiritual tourism); Cultural trips (thematic trips). The aim of this theming is to develop a positioning of the Czech Republic as a country of romantic stories, appealing to the contemporary desire for narrative and storytelling. The marketing objective of this thematic segmentation is to increase the number of tourists, to increase the regional spread of cultural tourism and gain higher tourism income. The communication objective is to change the perception of the destination, increase awareness of regional products, and increase the number of conversions (number of downloaded mobile applications, engagement rate, reservations of air tickets and accommodation, purchase of destination cards).

The programme is designed to appeal to the top markets (Czech Republic, Germany, Russian Federation), as well as strategic target markets (United States of America, Poland, France, Republic of Korea). The main target group is people with a university education, living in larger cities, well-travelled, between 30–50 years old, active on internet and social networks, SINKS, DINKS, empty nesters and families.

42 Irish Tourist Board (1988), *Inventory of Cultural Tourism Resources in the Member States*, DG VII, European Commission, Brussels.

43 Richards, G. (1996a), *Cultural Tourism in Europe*, CAB International, Wallingford.

44 Stebbins, R.A. (1997), 'Identity and cultural tourism', *Annals of tourism research*, volume 24 (2), pp. 450–452.

45 Bywater, M. (1993), 'The market for cultural tourism in Europe', *Travel and Tourism Analyst*, volume. 6, pp. 30–46.

46 Silberberg, T. (1995), 'Cultural tourism and business opportunities for museums and heritage sites', *Tourism Management*, volume 16, pp. 361–365.

The fairly one-dimensional measurement of motivation or involvement was later elaborated into more multidimensional approaches. For example a typology of cultural tourists was produced, based on the importance of culture in the decision to visit the destination and the depth of experience sought. The resulting matrix identifies five main types of cultural tourists:⁴⁷

- a) The purposeful cultural tourists (high centrality/deep experience), for whom learning about other's culture or heritage is major reason for visiting a destination;
- b) The sightseeing cultural tourist (high centrality/shallow experience), seeking a more shallow, entertainment-oriented experience;
- c) The casual cultural tourist (modest centrality/shallow experience); for whom cultural tourism plays a limited role in the decision to visit;
- d) The incidental cultural tourist (low centrality/shallow experience), where cultural tourism plays a small role in the decision to travel, but who participates in cultural tourism activities; and
- e) The serendipitous cultural tourist (low centrality/deep experience), who although not motivated by culture to visit but who has a deep cultural experience in the destination.

In spite of the widespread use of these and other cultural tourism typologies, they suffer from a number of weaknesses. It is often overlooked that individuals often shift between categories, depending on changes in interest, different types of holidays or locations:⁴⁸ "Many typologies are mostly descriptive and do not greatly help us in increase our understanding of tourist behaviour which is very essential."⁴⁹

Some other studies have attempted to explain why certain tourists fall into one category or another⁵⁰ and others have attempted to address these problems through the application of techniques such as latent class analysis.⁵¹ Through such statistical analysis it is possible to work with multidimensional data that can model the nature of the cultural tourism experience more closely. Multiple Correspondence Analysis (MCA) was used to visualize different groups of cultural tourists using data related both to the form of culture consumed and the type of attractions visited. This approach indicated that cultural tourists differ significantly in their consumption of different types of cultural attractions, depending on the context, levels of cultural capital and holiday type. One important implication is that different groups of cultural tourists will not just have different levels of cultural motivation or interest, but also that they will consume different forms of culture when travelling.⁵²

47 McKercher, B. and Du Cros, H. (2002), *Cultural Tourism*, Haworth Press, New York.

48 Isaac, R. (2008), *Understanding the Behaviour of Cultural Tourists, Towards a Classification of Dutch Cultural Tourists* (online), available at: www.tram-research.com (10-08-2016).

49 Ibid.

50 Stylianou-Lambert, T. (2011), 'Gazing from home: Cultural tourism and art museums', *Annals of Tourism Research*, volume 38, pp. 403–421.

51 van der Ark, L.A. and Richards, G. (2006), 'Attractiveness of cultural activities in European cities: A latent class approach', *Tourism Management*, volume 27, pp. 1408–1413.

Pulido-Fernández, J.I. and Sánchez-Rivero, M. (2010), 'Attitudes of the cultural tourist: a latent segmentation approach', *Journal of Cultural Economics*, volume 34, pp. 111–129.

52 Richards, G. and van der Ark, L.A. (2013), 'Dimensions of Cultural Consumption among Tourists: Multiple correspondence analysis', *Tourism Management*, volume 37, pp. 71–76.

3.2.4 Tourism and cultural synergies in space and time

Particular places have tended to be associated with specific forms of culture, and therefore different types of cultural tourism practice. In particular, there has been a strong relationship between cities, the growth of urban tourism and increased (mass) cultural tourism demand. In the past, major cities have been viewed as the major centres of national or regional culture, with large numbers of tangible cultural attractions and often with a strongly developed cultural image in the tourism market.

In recent years, however, there has been evidence of cultural tourism spreading to new destinations, driven by increased mobility and more experienced consumers. Cities such as Barcelona, Amsterdam and Lisbon have played an important role in the growth of urban tourism in Europe by developing their traditional heritage products (monuments and museums) alongside new attractions related to the contemporary culture and everyday life.⁵³ The largest cities in Europe, such as Paris and London, have not grown at such a fast rate. This is partly because they already have large numbers of tourists, but also because of shifts in the demand for cultural tourism towards new destinations, driven by increases in cultural supply, the desire for new experiences, the rise of low cost airlines and other factors.

Growth in rural cultural tourism has not been as dramatic, but because of the lower population densities and the relative lack of economic alternatives, the impact in many places has still been significant. Rural cultural tourism is argued to be significant because it can compensate for the decline in traditional industries, particularly agriculture, and diversify the economy.⁵⁴ Rural areas are also seen as being important for the development of *creative tourism*,⁵⁵ and the growth of *creative outposts* was identified, and defined as “rural locales engaging in innovative local development, including tourism, which has significant positive local social impacts.”⁵⁶ It is shown how cultural and creative tourism can be developed in even very peripheral locations such as northern Sweden, helping to diversify the economy, support innovation and broaden leisure opportunities for local people.⁵⁷

In both rural and urban locations, one of the biggest spatial shifts is from the development of cultural tourism in specific tourism or cultural spaces towards greater integration into the everyday life and culture of the destination. The growth of *new localities*⁵⁸ of tourism has been driven by the desire of tourists to *live like a local* and by the access given to everyday spaces through specialist local guides and Internet-based platforms such as Airbnb and Dine with a Local.⁵⁹ The effects of this can be seen in cities such as Barcelona or New York, where the spread of Airbnb-based tourism has attracted a lot of attention from the media, local citizens and hotels

53 Richards, G. (2014a), ‘Cultural Tourism 3.0. The Future of Urban Tourism in Europe?’, in: Roberta Garibaldi (ed.), *Il turismo culturale europeo*, pp. 25–38.

54 Smith, M. (2009), *Issues in Cultural Tourism Studies*, Routledge, London.

55 Ibid.

56 Brouder, P. (2012), ‘Creative Outposts: Tourism’s Place in Rural Innovation’, *Tourism Planning and Development*, volume 9 (4), pp. 383–396.

57 Ibid.

58 Russo, A.P. and Richards, G. (2016), *Reinventing the Local in Tourism: Producing, Consuming and Negotiating Place*, Channel View Publications, Bristol.

59 Richards, G. (2014b), ‘Tourism and creativity in the city’, *Current Issues in Tourism*, volume 17, pp. 119–144.

companies. Although some might argue that such locally-based tourism provides extra income for local people and more exposure for local culture, others have pointed to the problems caused for local communities by living in close proximities to tourists who might have very different habits and lifestyles.

Synergies between tourism and culture can therefore be found in both rural and urban areas, although cities have often been seen as major drivers of cultural tourism growth. In both urban and rural areas, there has been a growth of new types of attractions, events and experiences that have also attracted new audiences.

Cultural tourism, particularly in urban areas, has also been identified as a year-round product that can help combat seasonality. A report from the European Commission indicated that many European countries were developing cultural and heritage products with the specific aim of reducing seasonality.⁶⁰ Similar strategies have been adopted in other areas of the world, including South Africa⁶¹ and Australia⁶².

Because the cultural season often runs counter to the tourist season, cultural tourists can be attracted at times when other markets may be weak. There is also a widely held view that culturally-motivated tourists will tend to travel all year round to follow their specific cultural interests. Recent research in Sicily confirms that cultural tourism is less seasonal than other forms of holiday travel, although *must see* cultural sights seem less important in reducing seasonality than cultural sights in smaller historic cities.⁶³ Similar findings emerge from recent research⁶⁴ in Spain although in the Andalusia region the indications are that domestic cultural tourism reduces seasonality more than international tourism. In some cases, however, it may be argued that the tendency for cultural events to be concentrated in particular seasons may strengthen rather than reduce seasonality, as in the case of Argentina.⁶⁵ The research suggests that the tendency for traditional events to cluster around the same dates or periods of the year may actually produce increased seasonality in some cases.

The desire to attract visitors at particular times of the year has been one of the factors stimulating the growth of events and festivals. For example, the Edinburgh Festival was originally a summer event, but as the event grew, additional festivals were added in the winter period in order to attract visitors.⁶⁶

60 Commission of the European Communities (1993), *All-season Tourism: Analysis of Experience, Suitable Products and Clientele*, Commission of the European Communities, Brussels.

61 Oxford Business Group (2008), *The Report: South Africa*.

62 Lim, C. and McAleer, M. (2001), 'Monthly seasonal variations: Asian tourism to Australia', *Annals of Tourism Research*, volume 28 (1), pp. 68–82.

63 Cuccia, T. and Rizzo, I. (2011), 'Tourism seasonality in cultural destinations: Empirical evidence from Sicily', *Tourism Management*, volume 32 (3), pp. 589–595.

64 Cisneros-Martínez, J.D. and Fernández-Morales, A. (2015), 'Cultural tourism as tourist segment for reducing seasonality in a coastal area: the case study of Andalusia', *Current Issues in Tourism*, volume 18 (8), DOI:10.1080/13683500.2013.861810.

65 Belén Carruitero, P. (2011), *Estacionalidad de la Demanda de Turismo en Argentina*, Maestría en Finanzas Públicas Provinciales y Municipales (online), available at: sedici.unlp.edu.ar (10-08-2016).

66 Richards, G. and Palmer, R. (2010), *Eventful Cities: Cultural Management and Urban Revitalisation*, Routledge, London.

3.3 Tourism and culture partnership

3.3.1 How do tourism and culture benefit each other?

One of the key ideas in identifying the synergies between tourism and culture is that connections between these areas can generate mutual benefits.

As the OECD report on *The Impact of Culture on Tourism* noted:

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

Organisation for Economic Co-operation and Development (2009)

Culture therefore provides content for tourism, allowing countries and regions to differentiate themselves in an increasingly crowded marketplace, and tourism provides culture with new outlets for cultural institutions, products and content.

Many countries now place culture high on their agenda of tourism development and promotion, and tourism is seen as a fruitful market for culture, both in the short and longer term. The Dutch Museums Association, for example, recently identified the growth in international cultural tourism as one of the most influential future trends for their members towards 2026.⁶⁷ Culture is seen as adding to the distinctiveness of the Dutch tourism product, which then benefits museums in terms of increased visitor numbers. Growing numbers of visitors not only generates more income, but also serves to increase the profile of museums and other cultural institutions, helping them to demonstrate their importance and relevance.

Many countries also use the link between tourism and culture as a way of bringing national culture, or elements of it, to international attention. Visits by international tourists can help to create an image of a country abroad, which in turn may help the export of products and services to those countries and strengthen international relations.

The synergies between tourism and culture are perhaps even more evident at regional and local level, where culture becomes a means of transmitting regional and local identities and for drawing tourists to new destinations. Sometimes the development of cultural attractions can help to attract large numbers of visitors to relatively unknown places. The Guggenheim Museum in Bilbao, for example, has been the subject of much discussion on the attractive qualities of culture. After the museum opened in 1997, foreign tourism grew in Bilbao from around 100,000 a year to around 800,000 a year.⁶⁸ The Guggenheim effect helped to propel Bilbao into the first rank of cultural tourism destinations in Europe. However, as many analysts have pointed out, the success of

67 Nederlandse Museumvereniging (2010), *Agenda 2026: Toekomstverkenning voor de Nederlandse museumsector*.

68 Plaza, B. (2007), *The Bilbao effect (Guggenheim Museum Bilbao)* (online), available at: mpra.ub.uni-muenchen.de.

Bilbao is not only due to the Guggenheim, but to a long term programme of urban regeneration stretching back over 30 years. However, the mix of tourism and culture has been the element that has most often caught the attention of the outside world.

The development of the creative economy has arguably strengthened the relationship between places and cultural images and narratives. As the OECD report on *Tourism and the Creative Economy* points out there are many potential synergies to be found between tourism and the creative industries.⁶⁹

“The link with the creative industries offers interesting opportunities for tourism destinations to:

- Develop and diversify tourism products and experiences;
- Revitalize existing tourism products;
- Use creative technology to develop and enhance the tourism experience;
- Add atmosphere and ‘buzz’ to places; and
- Overcome the limitations of traditional cultural tourism models.”

“Tourism is also important for the creative industries because it has the potential to:

- Valorize cultural and creative assets;
- Expand the audience for creative products;
- Support innovation;
- Improve the image of countries and regions;
- Open up export markets; and
- Support professional networks and knowledge development.”

These creative synergies have been exploited by many destinations in recent years, particularly in terms of products such as film-induced tourism, literary tourism, architectural tourism and music tourism.

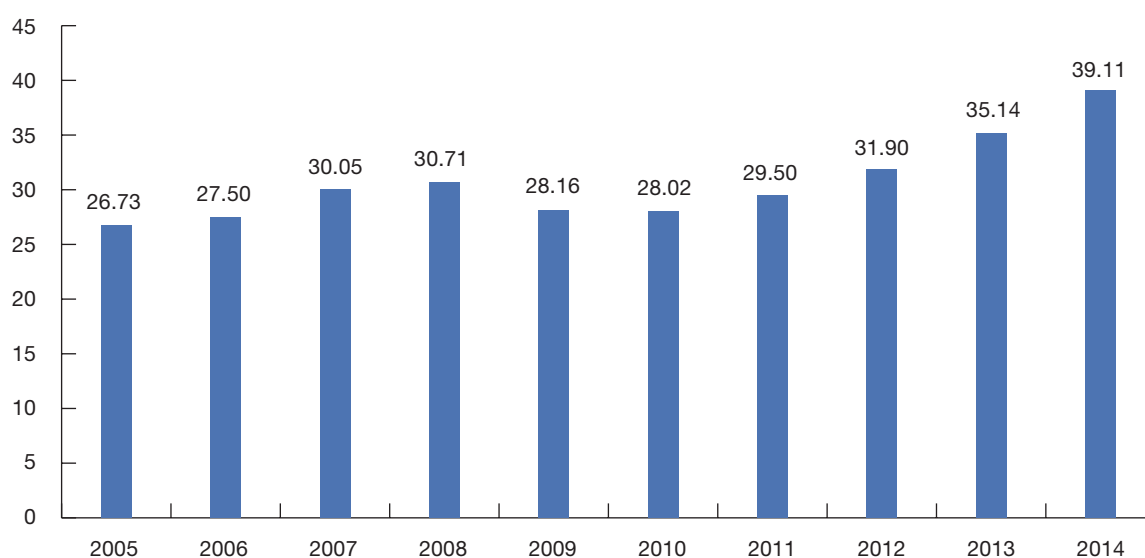
In times of economic adversity, it is not surprising that one of the most widely discussed synergies between tourism and culture is economic. Cultural institutions often struggle to survive, and tourism can provide a much-needed boost to their finances. The available figures on cultural tourism consumption clearly indicate the relatively high economic impacts that can be generated by cultural tourism, as in the case of Spain (figure 3.6).

Similar figures are available from the Netherlands, where international *cultural visitors* (those visiting museums in the Netherlands) spent a total of EUR 513 million, or EUR 857 per person per visit (table 3.3). This is over 80% more than the average international tourist.⁷⁰

69 Organisation for Economic Co-operation and Development (2014), *Tourism and the Creative Economy*, OECD, Paris.

70 NBTC Holland Marketing (2015), *Cultuurtoerisme in Nederland*, Nederlands Bureau voor Toerisme en Congressen, Den Haag.

Figure 3.6 Expenditure by international cultural tourists in Spain, 2005–2014 (EUR million)



Source: Ministerio de Industria, Energía y Turismo (2016), *FRONTUR: La encuesta de movimientos turísticos en fronteras*, Madrid: Ministerio de Industria, Energía y Turismo.

Table 3.3 Spending by cultural tourists and other tourists, 2014 (EUR)

	Cultural tourists	Museum visitors	Other tourists
Expenditure per person per trip	857	768	473
Expenditure per person per day	267	227	143

Source: NBTC Holland Marketing (2015).

The idea of cultural tourism as a large and fast growing sector of tourism has often created the impression that this can be a lucrative market for cultural content, but there are also many other areas in which there can be beneficial relationships. For example, a report by the Mexican Secretary of Tourism (SECTUR) in 2002 indicated the following benefits:⁷¹

Value of tourism for culture:

- Generates resources for conservation and benefits to the host communities;
- Motivates communities in the effective management of its cultural assets; and
- Raises awareness of the value of elements of “local heritage” among tourists.

Value of culture for tourism:

- It gives coherence to the destination offer;
- Increases competitiveness; and
- Increases length of stay, spending and satisfaction of tourists and hosts.

71 Secretaría de Turismo (2002), *El Turismo Cultural en México*, SECTUR, Mexico.

Similarly, the cultural tourism policy developed by Colombia in 2007 points out that cultural tourism can be developed in any kind of location, increasing the potential to spread and diversify tourism flows. Because cultural tourism is also seen as a form of special *interest tourism*, it can help in reducing seasonality.⁷² Other potential benefits of developing cultural tourism include increasing cultural exchange, which can help to develop cultural understanding and tolerance.⁷³

Cultural tourism is also viewed by many as a means of supporting local, regional and national identities and as a form of *serious leisure* cultural tourism tends to lead people to identify with the object of their travel. In many cases, tourists link the identity of a place with aspects of tangible culture, in particularly the built heritage.⁷⁴

For example as one study of the city of Pula, in Croatia notes:

“Local residents, their guests and experts agree that the city is recognizable primarily for its unique cultural, historical and natural heritage, and that the cultural identity ‘holders’ are the Amphitheatre, the old town core with the Roman monuments, turbulent history and multiculturalism, and a unique combination of the atmosphere of the ancient old town by the sea and the former Austria’s main naval port with powerful fortification system, which is still waiting for the proper valorization. To develop competitive products on the base of the distinctive cultural identity, it is necessary to point out special features and enhance the unique characteristics of the destination.”

Urošević, N. (2012)

Increasingly, however, destinations are trying to utilize a greater range of cultural and heritage resources in creating distinctiveness. This partly stems from a desire to extend the range of cultural resources employed, partly from the need to support different elements of intangible culture and partly from recognition that the *serial reproduction* of culture is undermining the distinctiveness of many places for tourists.⁷⁵

These benefits and the general argument that cultural tourism is a form of *quality* tourism are very often important in achieving local support for cultural tourism development. In the Spanish city of Barcelona research shows strong support for cultural tourism among residents, who see it as an important alternative to other forms of leisure tourism. There is also widespread recognition that tourists help to support cultural institutions in the city. When asked what kind of tourism the city should promote in the future, 48% indicated that Barcelona should promote cultural tourism, well ahead of business and congress tourism (30.5%).⁷⁶

72 Colombia (2007), *Política de turismo cultural: Identidad y desarrollo competitivo del patrimonio*, República de Colombia Ministerio de Comercio, Industria y Turismo, Ministerio de Cultura.

73 World Youth Student and Educational Travel Confederation (2007), *The impact of travel experiences on the cultural, personal and social development of young people*, WYSE Travel Confederation, Amsterdam.

74 Stebbins, R.A. (1997), ‘Identity and cultural tourism’, *Annals of tourism research*, volume 24 (2), pp. 450–452.

75 Richards, G. and Wilson, J. (2006), ‘Developing creativity in tourist experiences: A solution to the serial reproduction of culture?’, *Tourism Management*, volume 27, pp. 1,209–1,223.

76 Ajuntament de Barcelona (2013), *Percepció del Turisme a Barcelona*, Gerència Adjunta de Projectes Estratègics – Gerència Municipal, Departament d’Estudis d’Opinió, Barcelona.

This brief review of the nature, scale and impact of synergies between tourism and culture underlines the complexity of this relationship. In addition to understanding the very different motivations and needs of the tourism and culture sectors, policymakers also have to be aware of the wide range of impacts and effects that can be created by linking tourism and culture. They also have to deal with a very wide range of stakeholders, varying considerably in terms of scale, power and legitimacy.

3.3.2 New directions for tourism and culture?

How will the synergies between tourism and culture develop in future? The expert opinions in particular gave some pointers on this, including a growing importance for intangible heritage because the supply of tangible heritage is more difficult to increase. The increasing intangibility of tourism content provides new opportunities for the development of new themes and narratives and their delivery via new media.

The OECD report on *Tourism and the Creative Economy* underlines that the development of the experience economy has driven a trend towards the development of specific cultural and creative content for tourism experiences. This has diversified the content of cultural tourism away from tangible heritage-based experiences towards more intangible and creative forms of content. Such content can also be delivered digitally, which is driving the integration of culture, tourism and technology.⁷⁷

Increasingly destinations are transferring offline content online. Many cities have a wealth of information that is of potential use or interest to citizens and visitors alike, and this information is gradually being digitized and made accessible. Such *smart city* approaches are now being adopted in a number of destinations.

A *smart city* approach can also be a useful way of developing public-private partnerships, because the key physical cultural tourism resources and the information related to these are usually in the public realm. Cities and regions can use the vast store of information they have related to such assets to develop branding and storylines and to provide richer information and interpretation for visitors. Because of the place-based nature of much cultural tourism there is potential to use cultural sites as channels for locational information in different forms, including images, stories and augmented reality. Such applications of new technologies can also be important in terms of reducing language barriers, which is currently an important issue in the light of the growth of tourism from emerging economies.

The development of cultural content related to tourism has been stimulated by policies supporting the creative industries in many countries.⁷⁸ Government support for film, fashion, design, music and animation has often led to tourists being a target as potential consumers of such content. In many cases policies that were originally designed to stimulate creative production have ended up supporting tourism development. In the cases of Amsterdam, Milan and Antwerp, the fashion industry has become not just a means of attracting the creative class, but it has also provided the

⁷⁷ Organisation for Economic Co-operation and Development (2014), *Tourism and the Creative Economy*, OECD, Paris.

⁷⁸ Ibid.

basis for tourism attractions, such as the Fashion Cluster in Antwerp and the Quadrilatero d'Oro in Milan.⁷⁹ Creative content can also be important in developing the image and storytelling narratives that places increasingly utilize to distinguish themselves in a crowded marketing landscape.⁸⁰ This is evident in the profusion of film-based tourism initiatives, such as film maps, location-based attractions and theming.

For example, the 2012 film *Lost in Thailand*⁸¹ is the highest-grossing Chinese film ever, earning over CNY 1 billion at the box office and being seen by audiences of over 30 million. This has generated a huge increase in Chinese tourists to Thailand and particularly to Chang Mai, where the film was set. After the film's release Chinese tourist numbers to Thailand rose by 93% in the first quarter of 2013. Overall Chinese tourist numbers to Thailand have risen from only 2.7 million in 2012 to 8 million in 2015. *Lost in Thailand II* is now being filmed in the country, and other countries have also sought to cash in on the Chinese film tourism market with the making of *Lost in Hong Kong* and *Lost in India*.

Similar trends are evident in the music industry. For example, UK Music estimated that there were over 9 million music tourists in the United Kingdom in 2014, generating direct and indirect spend worth GBP 3.1 billion. This included over half a million overseas tourists, spending an average of over GBP 750 each. Music tourism in the United Kingdom increased by 34% from 2011 to 2014.⁸² These tourism flows provide important support to the music industry, which is being forced to change its business models because of the widespread copying of music content. Live performances have become more important to the music industry, and music-related tourism provides a growing proportion of total music revenues. In turn the music industry generates a wide range of experiences, attracting people from all over the globe. The report estimates that 45% of live music audiences now consist of *music tourists*.

The diversity of cultural and creative experiences now on offer reflect the fragmentation of the cultural tourism market and the growth of specialist niches, such as gastronomic tourism, music tourism, film-induced tourism, architectural tourism, and so on. This fragmentation has produced a growth in the supply of locally-based experiences, particularly those linked to local contemporary culture and lifestyles. *Living like a local* has become one of the most desirable *authentic* experiences, supported by the growth of products such as Airbnb and Roomorama. At the same time, the development of the mass cultural tourism market is based on the consolidation of demand around *must see sights*, producing apparently contradictory trends towards convergence and divergence.⁸³ The ATLAS research indicates that the experiences enjoyed most by cultural tourists tend to be those small-scale, less visited places that offer a taste of *local* or *authentic* culture. Tourists increasingly say that they want to experience local culture, to live like locals and

79 Pandolfi, V. (2015), *Fashion and the City: The role of the 'cultural economy' in the development strategies of three Western European cities*, Euberon, Delft.

80 Organisation for Economic Co-operation and Development (2014), *Tourism and the Creative Economy*, OECD, Paris.

81 Director: Xu Zheng, 2012, China.

82 UK Music (2015), *Wish you were here: Music Tourism's Contribution to the UK Economy* (online), available at: www.ukmusic.org (10-08-2016).

83 Lemaître, M. (2015), *Ressources patrimoniales culturelles et d'éveloppement touristique*, Economies et finances, Université Toulouse le Mirail – Toulouse II.

to find out about the real identity of the places they visit,⁸⁴ but at the same time the places they visit tend to be more similar because of the *serial reproduction*⁸⁵ of cultural experiences.

The growing use of cultural and creative content in tourism also offers opportunities to re-define the relationship between the tourism and cultural sectors. To date, much of the debate about the positive effects of tourism-culture synergies has revolved around the economic benefits to culture and the content benefits to tourism. However, there is room for a deeper and more fruitful relationship as well. At the *UNWTO/UNESCO World Conference on Tourism and Culture in Siem Reap, Cambodia*, in 2015, UNWTO Secretary-General Taleb Rifai outlined other potential ways of working:⁸⁶

1. Tourism and culture can work together for economic growth, as the responsible use of cultural assets for tourism creates new employment opportunities and generates income for local communities;
2. Tourism and culture can work together for social development and stability by exposing people to different ethnicities, religions and lifestyles. First-hand experience of living traditions supports global dialogue and increases understanding and mutual respect; and
3. Tourism and culture can work for heritage protection and preservation through carefully managed tourism that promotes education among tourists and host communities and ensures coordination and cooperation between conservation and tourism.

In addition, as suggested by the OECD study on *Tourism and the Creative Economy*, the convergence of tourism, culture and creativity provides opportunities for tourism destinations to position themselves in the networks that underpin the knowledge economy, using the attractiveness of place to embed knowledge and talent.⁸⁷ As an International Federation of Arts Councils and Culture Agencies (IFACCA) report on *Creative Intersections* also suggests, adopting a *cultural lens* may also benefit tourism stakeholders, enabling them to:⁸⁸

- Understand the context and the community and then being able to respond appropriately to its needs;
- Enhance capacity, dialogue, social cohesion and inclusion, and wellbeing within the actions and in the community;
- Bring to partnerships creative thinking, innovation, new solutions, instruments for networking, interdisciplinary research, alternative perspectives and working methods, and fresh insights; and
- Develop dialogue and understanding between different disciplines and the public.

Creative intersections mean interactive collaborations between individuals, groups and organizations from the art and culture sector and those in other disciplines or sectors. Such intersections can be creative on both sides: “Creativity allows destinations to innovate new

84 Richards, G. (2009), ‘Creative tourism and local development’, in: Wurzbürger, R. et al. (eds.), *Creative Tourism: A global conversation*, Sunstone Press, Santa Fe, pp. 78–90.

85 Richards, G. and Wilson, J. (2006), ‘Developing creativity in tourist experiences: A solution to the serial reproduction of culture?’, *Tourism Management*, volume 27, pp. 1,209–1,223.

86 World Tourism Organization (2016c), *UNWTO/UNESCO World Conference on Tourism and Culture: building a New Partnership – Siem Reap, Cambodia, 4–6 February 2015*, UNWTO, Madrid.

87 Organisation for Economic Co-operation and Development (2014), *Tourism and the Creative Economy*, OECD, Paris.

88 International Federation of Arts Councils and Culture Agencies (2012), *Creative Intersections: Partnerships between the arts, culture and other Sectors*, IFACCA, Sydney.

products relatively rapidly, giving them a competitive advantage over other locations. Because creativity is a process, creative resources are generally more sustainable than tangible cultural products.”⁸⁹ These benefits can only be developed through direct partnership and collaboration between the tourism and cultural sectors.

New forms of networking and partnership between tourism and culture will therefore provide more opportunities in future. Some of the best practice cases presented by the Member States already indicate a number of potential developmental directions. Most of the new style collaborations are bottom-up, often involving SMEs and/or the local community.

The recent UNWTO report on *Tourism and Culture Partnership in Peru – Models for Collaboration between Tourism, Culture and Community* offers a community-based model of cultural tourism development that seeks to increase the sustainability of the relationship between tourism and culture by highlighting their interdependent nature. The *triangular model* of community-based cultural tourism proposes “community-based, culture-driven, tourism-led development”⁹⁰. In this model, cultural tourism is defined as follows:⁹¹

“Community-based sustainable cultural tourism involves the harnessing of tangible and intangible cultural resources in order to support the cultural, social and economic vitality of the local community, creating understanding between stakeholders, thus facilitating the provision of authentic and engaging experiences for visitors.”

As suggested by the expert responses in the current study, unless the local community is actively involved in tourism development it will not be possible to ensure the sustainability of the living culture that provides the attraction for tourism. This principle is central to the Siem Reap Declaration on Tourism and Culture adopted by the UNWTO in 2015,⁹² which recognizes the aspirations of local communities as an important underpinning for sustainable cultural tourism development.

3.3.3 Challenges for the future development of tourism and culture

The idea that different people consume different types of culture on holiday draws attention to the types of experiences and cultural and creative content offered by different locations. In the past, cultural tourism has been most heavily developed in locations that offer the highest concentrations of easily accessible tangible heritage, such as monuments and museums. The volume of cultural tourism expected in most locations could therefore be related to the volume of *real cultural capital* that they possess.⁹³ This pattern is underlined by a recent research which emphasizes the concentration of tourist flows at major cultural sites.⁹⁴ Of the 57 million visitors

89 International Federation of Arts Councils and Culture Agencies (2012), *Creative Intersections: Partnerships between the arts, culture and other Sectors*, IFACCA, Sydney.

90 World Tourism Organization (2016b), *Tourism and Culture Partnership in Peru – Models for Collaboration between Tourism, Culture and Community*, UNWTO, Madrid.

91 Ibid.

92 World Tourism Organization (2016a), *Compilation of UNWTO Declarations, 1980–2015*, UNWTO, Madrid.

93 Richards, G. (1996b), ‘Production and consumption of European Cultural Tourism’, *Annals of Tourism Research*, volume 23 (2), pp. 261–283.

94 Lemaître, M. (2015), *Ressources patrimoniales culturelles et d’éveloppement touristique*, Economies et finances, Université Toulouse le Mirail – Toulouse II.

to museums in France in 2010, over 36% of visits are accounted for by the top four institutions, all located in Paris. This tendency towards *mass cultural tourism* at a limited number of sites has arguably produced a vicious cycle of tourism in some cities, where increasing concentration of tourists forces others away, eventually reducing the overall economic returns of cultural tourism.⁹⁵

The effects of tangible heritage location can be analysed at national level using data on the supply of UNESCO World Heritage Sites⁹⁶ and the data on cultural tourism in different countries collected for the current report. This analysis shows that there is a strong positive correlation between the number of world heritage sites and the number of cultural tourists reported in each country (Pearson correlation coefficient 0.749, significant at the 0.01 level). This seems to confirm that countries with a large stock of tangible cultural heritage will tend to attract larger numbers of cultural tourists.

The attraction power of tangible heritage and other elements of destination culture is in the eyes of many not reflected in the resources flowing from tourism into the cultural system. In many destinations the proportion of tourist spending that is retained by the cultural attractions is relatively low. There have therefore long been calls to find mechanisms to ensure a flow of resources from tourism (which is seen as capturing the bulk of tourist spending) and culture.⁹⁷ One possibility would be to levy a tax on accommodation or other tourist services in order to fund cultural institutions.

Box 3.2

Culture and tourism taxes in Germany

Many cities in Germany have introduced culture and tourism taxes in recent years. One of the first cities to do so was the city of Weimar, which was European Capital of Culture in 1999. The tax was introduced to compensate for the relatively high cultural expenditure arising from this major event, held in a city with a population of 65,000. Since then many other German cities have introduced similar taxes. For example, Hamburg introduced a culture and tourism tax in 2013. The administration has promised to invest 100% of the revenue in tourist, cultural and sporting projects which enhance cultural provision and boost the tourist economy. The tax is applied to short stays in hotels, motels, boarding houses or guest houses. The tax rate set in 2013 was EUR 0.50 for bills of EUR 25 or less, and 2% of the total accommodation bill for greater amounts. In Cologne the culture and tourism tax amounts to 5% of gross room rates. However, in Cologne the revenues from the tax flow into the general budget of the city, making the term “culture tax” (*Kulturförderabgabe*) debatable.

Contemporary cultural consumption by tourists has also become more complex than a single-minded pursuit of *must see sights*. One important reason for this is that the basic concept of *culture* has broadened in recent decades, to include not just heritage and the high arts, but also contemporary culture and creativity. One of the most important implications of this shift has been a growing focus on intangible culture alongside the longstanding focus on tangible culture and heritage.

95 Russo, A. P. (2002), ‘The ‘vicious circle’ of tourism development in heritage cities’, *Annals of Tourism Research*, volume 29, pp.165–182.

96 World Economic Forum (2015), *Travel and Tourism Competitiveness Report 2015*, WEF, Geneva.

97 Richards, G. (2011), ‘Rethinking niche tourism in the network society’, *Paper presented at the ATLAS Annual Conference in Cyprus* (online), available at: www.academia.edu.

The changing habits of cultural tourists have also effectively repositioned the local community as part of the local experience being sought by many visitors. In some cases, therefore, local residents may effectively become part of the *everyday life* consumed as a tourist product, whether they like it or not. As research in Barcelona shows, the overwhelming majority of contacts between tourists and locals are positive, and problems tend to be limited to specific places and/or times. Nonetheless single incidents may sometimes be enough to spark wider resistance to tourism.⁹⁸

The extended concept of cultural tourism means that a wider range of stakeholders are also now implicated. It is no longer a question of bringing tourism and cultural professionals together. It now involves many local residents, Airbnb hosts, freelance guides, creative entrepreneurs, website operators, and many others. Bringing these groups together is a question of finding shared interests that go beyond economic impact (which is often too abstract for many), and reach into areas of social cohesion and intercultural understanding. This in turn implies that the development of shared interests around tourism and cultural synergies is part of a broader process of community building or place making.

Bringing tourism and culture together is also often hampered by the *different languages* which pervade the two sectors.⁹⁹ In the tourism sector the language is dominated by commerce and marketing and serving consumers. The language of the cultural sector deals largely with serving the needs of citizens, through increasing access and providing educational opportunities. These linguistic differences often make it difficult to maximize synergies, even when cultural and tourism organizations may both be focussed on attracting visitors.

One of the strategies for reducing the apparent differences between the tourism and cultural sectors is to emphasize the growing convergence between tourists, visitors, local residents and other groups. As the policy documentation for Montenegro points out:¹⁰⁰

“Along with educational tourism, cultural tourism is no longer a minority interest: culture and education are tourism boom sectors. Four principles apply when planning cultural tourism:

1. The products must be designed for locals and tourists. This makes the products offered to tourists more authentic, but it also raises their capacity utilization;
2. Cultural tourism should impart specifically local, genuine experience – culture should be a *live* event at the holiday location;
3. To preserve cultural resources in the long run, they must be put to sustainable use but they must also be organized to meet environmental and social standards; and
4. Products in cultural tourism must stand out for their high degree of expertise, meticulousness and imaginativeness.”

A number of destinations are therefore trying to bridge the gaps between *tourists* and locals by treating tourists as *temporary citizens*.¹⁰¹

98 Richards, G. (2016), ‘Tourism and the city: Towards new models?’, *Afers Internacionals*, volume 113.

99 Organisation for Economic Co-operation and Development (2009), *Impact of Culture on Tourism*, OECD, Paris

100 Montenegro Ministry of Tourism and Environment (2008), *Montenegro Tourism Development Strategy to 2020* (online), available at: tourismandculture.org (11-08-2016).

101 Richards, G. (2016), ‘Tourism and the city: Towards new models?’, *Afers Internacionals*, volume 113.

Box 3.3

Bringing tourism and culture together in Mexico

The annual Cultural Tourism Fair Mexico FTCMEX is jointly organized by the Ministry of Tourism and the National Council for Culture and Arts of Mexico. The FTCMEX is a showcase for the tourist-cultural offer of Mexico. It is a meeting point for professionals in the tourism industry, where you can discover the traditional and most innovative cultural travel destinations. It supports parallel transmission professionalism and knowledge of this product line. The organization of this fair is an example of the cross work of these two sectors each addressing the issue of competence: Tourism towards the promotion and marketing and Culture to the conservation, preservation and protection of cultural heritage by taking advantage of its tourism potential because in this show a Gastronomic Pavilion, a craft fair and a forum Cultural Agenda in addition to display these strengths of the country, foster national identity is installed, they constitute sustainable part of the event to support traditional cooks, artisans and art groups. All this aimed towards a common objective which is the promotion of cultural tourism.

Chapter 4

Conclusions and recommendations

This global review indicates that synergies between tourism and culture are seen as key opportunities for most countries. Tangible and intangible heritage represent important cultural resources that provide content for tourism and identity, and distinction for cultural destinations. At the same time, tourism is viewed as providing support for culture, by generating income and increasing attention for cultural resources. In the future, the potential for synergies between tourism and culture is expected to increase, as tourist interest in culture grows and communities are better able to channel this interest to beneficial ends.

It is to be noted that during the Twenty-second session of the UNWTO General Assembly in Chengdu, China (11 to 16 September 2017), the following definition for “cultural tourism” was adopted:

“Cultural tourism is a type of tourism activity in which the visitor’s essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination.

These attractions/products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions.”

Currently, tangible and intangible heritage represent the core of ‘cultural tourism’ supply. Almost all UNWTO Member States see tangible and intangible heritage as part of cultural tourism. In addition, a sizable majority also recognize contemporary culture as providing cultural tourism resources. In terms of importance, tangible heritage was rated as most important, followed closely by intangible culture. Contemporary culture was seen as slightly less important.

However, there are now significant cultural changes taking place that are extending tourism consumption to new areas, marking a shift away from tangible heritage to intangible heritage and contemporary culture and creativity. This trend provides new opportunities for countries to utilize a wider range of resources to attract tourists, but it also creates new challenges of experience development, marketing and management. The culturally specific nature of these experiences also needs to be recognized, as the experiences are related both to the culture of the destination (presentation and interpretation) as well as the culture of visitors.

The importance of cultural resources for tourism was underlined by the fact that 90% of Member States have a specific policy related to cultural tourism, and 85% indicated that cultural tourism has a specific place in their marketing strategy. The indications are that those countries with a specific cultural tourism policy and/or a cultural tourism marketing strategy attract more cultural tourists.

For those countries able to provide an estimate of the size of the cultural tourism market, the average percentage of inbound tourism accounted for by cultural tourists was almost 36%. However, there was a sharp dichotomy in estimates depending on the measurement technique used. For those using a *narrow* measure of culturally-motivated tourists the average proportion was 16%, whereas those countries using a *broad* measure based on tourists participating in cultural activities the average was 47%. When the estimates of cultural tourism are weighted according to the volume of international arrivals in each country, the narrow estimate is almost 14% and the broad estimate over 39%. The idea that cultural tourism accounts for around 40% of international tourism arrivals was supported by the tourism and culture experts, who judged the proportion of cultural tourists under a broad definition to be 46% on average, or 40% as the median measure.

For those countries measuring the role of culture as a primary motivation for inbound tourists, the average reported was around 30%. In addition, around 17% of inbound tourists were reported as having culture as a secondary motivation. This underlines the importance to see culture not just as an attractor for tourists, but also as an important element of the general tourism experience. Perhaps not surprisingly National Tourism Organizations tend to pay less attention to domestic cultural tourism and cultural day visitors. However, countries that do monitor these markets indicate that this segment is important and consequently requires specific attention. This is also likely to be an area in which collaboration between different levels of government will produce positive effects.

Although the cultural tourism market is important in terms of tourist numbers, it is perhaps even more significant in terms of expenditure. The experts underline that cultural tourists tend to be relatively high spending, and are important in generating income and employment.

Both the Member States and the experts support the general idea of cultural tourism as a growth market. The Member States reported an average growth for cultural tourism of 20% over the past five years, or 4% a year. The experts generally felt cultural tourism would increase in the next five years, and 40% thought it would increase significantly.

The varying estimates in the volume and growth of cultural tourism point to methods of measurement as an important area requiring attention. At present, around 60% of the Member States measure cultural tourism in some way, but only a small proportion measure both cultural motivations and activities of inbound arrivals. The vast majority of the experts feel that the most appropriate way of measuring cultural tourism is to use both indicators. Some countries that do not currently measure cultural tourism indicated that they intend to do so in future, but there is clearly room for improvement.

Measurement of cultural tourism is also an important means of communicating with key stakeholders, including the local community. Data on the volume, value and behaviour of cultural visitors can support marketing by public and private partners, and help local communities to make informed decisions about the types of activities that might be appropriate to promote. The effectiveness of such measurements can also be increased by linking the indicators used to the aims of tourism and cultural policy.

The main future priorities of Member States are product development and marketing, reflecting the marketing remit of most national tourism organizations. Understanding tourist behaviour was seen

as most important specific policy area, followed by diversification and then balancing promotion and protection of culture. Those countries that prioritize product development and marketing also rank understanding tourist behaviour and diversification highly. For the experts the development of integrated approaches to tourism and culture and community empowerment and inclusion were seen as the main policy priorities.

In terms of the types of support measures that the experts felt were important for cultural tourism, product development was rated most important. This matches the priorities of the Member States as well. However, the experts then gave a higher rating to networking and cooperation and capacity building and training. This seems to link to a bottom-up view of cultural tourism development, which is more based on broad stakeholder and community involvement. Member States also gave least priority to top-down measures such as legislation for cultural tourism.

The need to balance promotion and protection was emphasized by many Member States as well as in the expert responses. Protecting cultural assets is particularly difficult in the face of rapid change in many countries, as well as in the face of economic adversity and declining cultural budgets. This creates a more urgent need to find ways in which resources generated by tourism can also benefit the protection and development of culture. However, protecting culture is also a question of awareness, and there is a need to involve a greater range of stakeholders in the development of synergies between tourism and culture. In particular the local community is vital in this regard, although also often the most difficult stakeholder to define and involve. Community involvement in tourism has many potential benefits as underlined by the Member States and the experts, including increased sustainability, capacity building, supporting local identities and stimulating local development.

Marketing and promotion of cultural assets also need to be undertaken in an effective and sensitive way, particularly as raising awareness of culture is an important means of involving local communities and ensuring appropriate use of cultural assets by tourists. A number of specific types of marketing and promotional strategies were put forward as best practice by the Member States, including communication through targeted websites and social media, improved market segmentation, development of cultural routes, theming and cultural storylines, improved interpretation, and awareness building with local communities. Effective marketing of cultural experiences for increasingly demanding consumers also requires training and capacity building to extend the skills and knowledge of stakeholders.

The development of partnerships, and particularly public-private partnerships (PPP), was seen as an important aspect of the future development of cultural tourism. Involvement of private sector actors is also likely to become more important in future since destination marketing increasingly becomes a collaborative exercise. As the content of cultural tourism shifts towards intangible and creative content, so the provision of content also comes to rely more on the commercial sector. However, the place-based nature of tourism activity also means that the public sector has to play an important role in developing tourism-culture synergies. Embedding creative content in the destination means that more of the benefits of cultural and creative tourism development can be secured for the local community.

The development of place-based cultural tourism also underlines the need for collaboration between different levels of government. This is particularly important because marketing to inbound tourists is often undertaken at national level, whereas the management and marketing of

cultural assets is often a task for regional and local government. Such collaboration is particularly important in spreading cultural tourism to new areas, and in ensuring the effective management of important cultural sites.

Partnerships are also important in developing new technology and innovation in cultural tourism. The technical skills required for new systems of interpretation, visualisation or data retrieval are not generally available in the tourism sector, and the creative skills needed to generate effective storytelling and narratives related to cultural tourism experiences are more likely to be found in the cultural sector or the creative industries than the tourism sector.

Tourists themselves should also be considered essential partners in the effective development of tourism-culture synergies. Increasingly tourists are becoming co-creators of tourism and culture, and they are helping to shape new cultural experiences for themselves, for other visitors and for local residents.

4.1 Tackling challenges

Although cultural tourism is a large market with significant potential for future growth, there are still noteworthy issues to be addressed to ensure the effective development of tourism and cultural synergies.

Raising awareness of the importance of culture is crucial to the development of tourism-culture synergies. For cultural tourism to be sustainable, account has to be taken of the inherent value of cultural assets as well as the cultural needs of local communities, tourists and other stakeholders. Improved awareness in local communities is likely to lead to better preservation and development of culture, and greater awareness among tourists reduces undesirable behaviour and increases cultural understanding.

A major challenge identified by the Member States and the experts is the tendency for cultural tourism to concentrate around major tangible heritage sites. This raises problems of visitor management and can increase negative impacts on local communities. More therefore needs to be done to try and spread the flow of cultural tourists to other areas, and to increase the visibility and accessibility of lesser-known sites.

Although countries usually emphasize the uniqueness of their culture, many of the resources developed and promoted for cultural tourism are similar from one destination to another. More creativity needs to be employed in the development of tourism-culture synergies so that more distinctive and innovative experiences can be offered. A stronger link between place, tourism and culture development and marketing is needed to ensure the development of distinctive and memorable cultural experiences.

The growth of tourism and the emergence of new generating markets imply a greater diversity of tourism cultures, both in terms of destinations and tourists. Destinations will need to address the needs of new tourist markets with increased cultural distance and a growing diversity of cultural needs and attitudes. At the same time many places are themselves becoming more culturally diverse, meaning that the development of tourism-culture synergies will need to take account of a greater range of cultural attitudes and sensitivities.

Many of the challenges involved in developing tourism and culture synergies create a greater need for stakeholder collaboration. As noted in many previous studies there are significant differences in values and operational practices between tourism and culture stakeholders. In the past this has often been viewed as a question of different language, but the current study indicates that this may now be less of an issue. What may be more important is the question of the distribution of benefits flowing from the development of tourism and cultural synergies to the different stakeholders. For many cultural stakeholders there is a perception that tourism takes a disproportionate share of the economic benefits and that not enough resources flow to the cultural sector. This point of contention seems to have become more acute with recent economic adversity and reductions in government funding for culture in many countries.

4.2 Recommendations

On the basis of the findings of this report, a number of recommendations can be made to guide the development of tourism and culture synergies in future.

4.2.1 Creating vision

The development of tourism and culture synergies should stem from a clear vision of what culture means to the places visited, and how the values of those places should be shared with visitors. A place-based cultural vision can become a means of creating distinction in an increasingly crowded cultural tourism marketplace, giving new meaning to cultural assets and practices for local communities. Such a vision needs to clarify why culture is important to a place and what benefits it offers to all place stakeholders, including visitors. Such a vision can provide direction and leadership for a diverse group of stakeholders, and stimulate collaboration in reaching shared goals. Collaboration can also be supported by linking specific aims and objectives to the vision, which can be adjusted to take account of changing stakeholder needs and the dynamic nature of tourism and culture.

In developing such a vision, stakeholders should take account of the cultural diversity of place and visitors, linking tangible and intangible heritage and contemporary culture in a way that inspires respect and stimulates inter-cultural communication.

4.2.2 Generating better information

It is clear that better and more comprehensive data are required to adequately chart tourism and culture synergies and to guide policy and operations. At present there is little consistency in the measurement of cultural tourism and no agreed definition that can make measurement more consistent. It is therefore suggested that Member States review their data collection strategies related to cultural tourism.

The most important point is to be clear about what is being measured. As this report shows, there is a big difference between narrow (motivation-based) and broad (activity-based) definitions of cultural tourism. Ideally, measurements should be made of both aspects of cultural tourism, because they measure different, but complementary dimensions. A narrow motivation-based

measurement provides a clearer picture of the driving forces for tourists who are travelling for and who can be attracted directly by culture. A broader activity-based measurement gives a picture of the visitors who will come into contact with culture as part of an overall tourism experience, but who will often be motivated to travel for other reasons. As the data from some countries have shown, this can also be a reason to measure culture both as a primary and as a secondary reason for travel. Providing better data on both cultural motivations and activities implies a more widespread use of primary data collection (e.g., interviews or surveys).

In undertaking primary research on cultural tourism, a consistent definition should be employed. This definition and the indicators associated with it should be consistent with the aims of cultural tourism policy. In many cases policy is not directed at increasing the number of tourists per se, but at increasing tourism expenditure or diversifying tourism markets. Collaboration between national governments and regional and local authorities could also provide a basis for measuring cultural day visits and domestic cultural tourism, which as the current report shows can also be an important part of the total cultural tourism market.

Member States should also investigate the possibilities of using existing data sources to chart tourism and culture synergies and to support marketing, improve the tourist experience and aid cultural protection. This is an area in which employing big data and developing *smart tourism* or *smart destination* systems could be useful. Because public authorities already possess a large amount of data related to cultural assets and practices, there is potential to make these available to visitors directly or to allow other actors to develop information delivery systems or applications that can enhance the visitor experience and also provide local communities with better information about their culture.

The quality of information related to tourism and culture could also be improved by undertaking more evaluation of the results of policy implementation in this area. The policy area considered most important for Member States is 'understanding tourist behaviour', but relatively few countries seem to undertake structured research to achieve this. Considering that 'balancing promotion and protection' is seen as an important aim of policy, there also seems to be a need for tourism and cultural bodies to work together to ensure the exchange of information necessary to support such a policy.

4.2.3 Developing more specific cultural tourism policy

There is some evidence from the current study that suggests that more active cultural tourism policy development can help to stimulate greater cultural tourism flows. By strategically highlighting key cultural experiences, the attention of different stakeholder groups can be attracted to specific fruitful development areas. Although most countries see cultural tourism as an important market, fewer have yet come up with specific policies aimed at developing cultural tourism or ensuring the flow of benefits to all stakeholders.

4.2.4 Creating more targeted marketing activity

Marketing and promotion activity should also be more focussed on target markets that offer particular potential for the future. Again, there is evidence to suggest that those countries that have a specific marketing strategy for cultural tourism attract more cultural tourists than others.

Member States and other stakeholders should recognize that cultural tourism is not a homogenous market, but consists of many different segments, niches and special interest groups. Identifying these different segments can provide valuable information for marketing and promotion purposes, and help to identify new areas for developing tourism and culture synergies. Many destinations already have their own tourism segmentation systems that can be used to identify groups that are of particular interest in terms of cultural consumption. In other cases the use of an existing typology may provide a basis for segmentation.

The target segments may also need to be adjusted to account for future changes in growth markets, cultural background and desire for cultural experiences. As well as tourists coming from emerging markets, there are also upcoming cohorts of younger tourists who will have different interests and cultural needs to previous generations. Research by UNWTO and WYSE Travel Confederation in 2016 has underlined the strong interest of youth tourists in cultural experiences. In particular the younger *digital natives* born after 2000 are likely to want to experience different aspects of culture and to access them in different ways than their parents.¹

At the same time it also needs to be recognized that many cultural assets draw the bulk of their visitors from older age groups. Destinations will need to take account of their needs in terms of accessibility and information provision in order to ensure that the aging population of mature markets will also continue to visit in large numbers.

Stakeholders should be aware that even within specific market segments there can be considerable variation in taste and demand. The rise of the *cultural omnivore* underlines the fact that many consumers now combine different forms of culture (high culture, popular culture, everyday culture) in a single trip, or even in a single day. Segmentation systems therefore need to be flexible.

4.2.5 Ensuring cultural protection

Protecting cultural assets is essential to maintain the attractiveness of cultural destinations. This is a particular challenge for emerging destinations, where rapid tourism growth can occur in the absence of well-defined regulation and a lack of stakeholder awareness. In many destinations with popular cultural sites, management and control systems (for example timed ticketing, differential pricing) are already in place to cope with visitor pressure. As cultural tourism grows, it is likely that such systems will be extended, and this is an area where the exchange of knowledge and experience between destinations can be of great value.

The current study has underlined the importance of community involvement as a means of raising awareness of the need for cultural protection, both among local residents and tourists. Destinations

¹ World Tourism Organization and World Youth Student and Educational Travel Confederation (2016), *The Power of Youth Travel* (2nd edition), UNWTO, Madrid.

should consider how more bottom-up planning and implementation of tourism development can be achieved, and how local communities can be given a voice in tourism and culture decision-making. Local communities who feel they have a stake in their own culture are more likely to respect and protect it. Similarly, destinations should consider ways to involve tourists more directly, as *co-creators* of tourism or *temporary citizens* in the destination.

Destinations should consider how the benefits of tourism and culture synergies are currently distributed, and examine ways to ameliorate any potential imbalances. Better collaboration between the tourism and culture sectors can be one means of ensuring that more resources flow to culture as a result of tourism activity. Where taxes are raised through tourism consideration could also be given to devoting some of these resources to cultural development and marketing in order to ensure the health of basic cultural resources.

4.2.6 Using technology and innovation

New technology can support the development of engaging experiences related to tangible and intangible heritage as well as contemporary culture. This report shows that a number of destinations are already employing many new means of distributing information or enhancing the visitor experience. In future these developments are likely to become even more important, as access to communication technologies among consumers increases and those technologies continue to become more powerful.

Destinations should examine the potential to utilize the information available to governments (national, regional and local) to create new information portals or applications that will allow visitors to access richer data. The possibilities of enhancing the interpretation of cultural assets through augmented reality and other techniques should also be explored.

4.2.7 Building collaboration

The exchange of views and information between stakeholders is vital in maximizing the synergies between tourism and culture. Destinations should therefore consider establishing stakeholder forums to identify issues, suggest solutions and influence policy-making. Many destinations already have networks related either to tourism or culture, but few currently provide opportunities for an exchange of views and experience between stakeholders from the different sectors. Destinations where these have been developed have already shown that they can offer significant advantages in terms of increased marketing power, information exchange and funding. One expert recommended:

“Creating stakeholder fora in destinations, involving the most senior players with both power and influence across public and private sectors, and within such fora allowing a common agenda to evolve and thus a common framework for strategic interventions.”

There may also be a need to develop such networks at international level, or between international, national and regional bodies. In particular the experts identified a role for international bodies such as UNWTO, OECD and UNESCO in assisting countries and regions in developing tourism and culture synergies. As one expert commented:

“In my opinion a high level seminar is required to discuss (and sometimes untangle) requirements for policy formulation, strategic development and operational management in the framework of a new expanded definition of what constitutes cultural tourism, its measurement within an ethical and sustainable model for tourism development in general.”

Another noted:

“At the national level ministries with other public funding organizations could promote a new kind of partnership between the cultural and other creative sectors and the tourism sector, encourage municipalities to participate in activities, enhance the development of social innovations and inform (educate) funding organizations.”

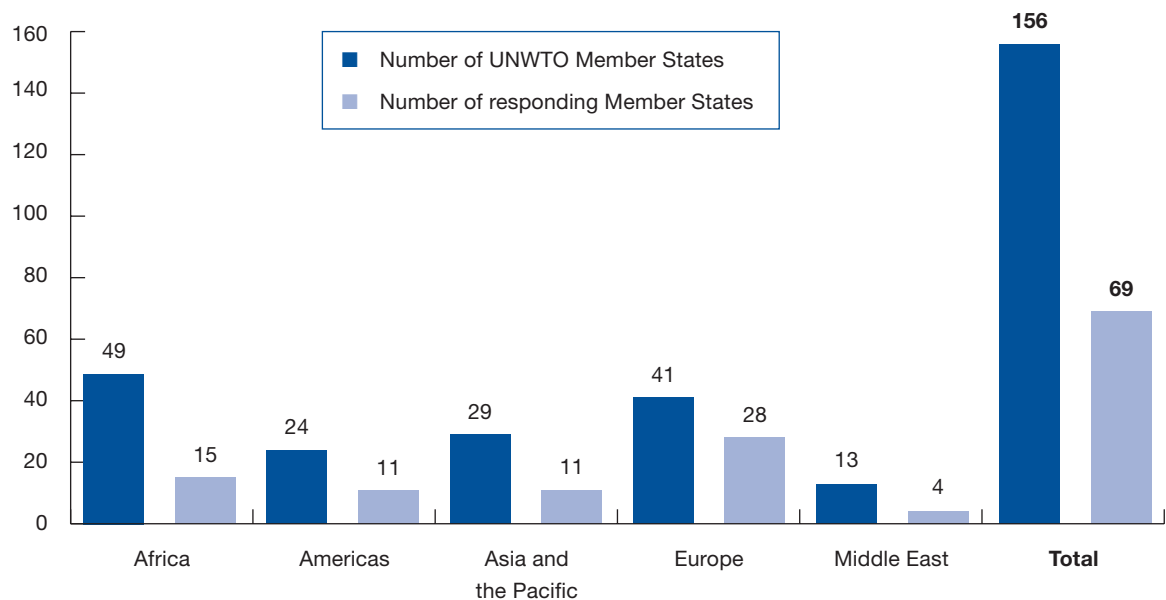
Annex I

Member States survey and graphical results

I.1 Tourism and Culture Survey 2015

Results of Member States participation

Figure I.1 Distribution of responses by UNWTO region



What is the survey about?

Tourism has grown over recent decades to become one of the leading global socio-economic sectors of our times. Culture, reflected in heritage and traditions as much as in contemporary art, languages, cuisine, music, handicrafts, museums and literature, is of immeasurable value to host communities, shapes community identities, fosters respect and tolerance among people, and has become a key tourism asset, creating distinctive differences between destinations.

Cultural tourism development and tourism and culture partnership can make a significant contribution to the socio-economic development and empowerment of local communities. An increased interest in cultural tourism was expressed during several recent UNWTO events and activities.

Following up on the conclusions of the UNWTO/UNESCO World Conference on Tourism and Culture: Building a new partnership¹, and on the results of the survey on Members' priorities for 2016–2017² recently conducted by UNWTO, in which many Member States ranked culture as one of their highest priorities, this survey aims at understanding the needs and priorities of Member States in regard to cultural tourism development and tourism and culture partnership, as well as collecting good practice cases from Member States.

How is the questionnaire structured? How to fill it in?

The survey is structured in two parts. The first part explores how cultural tourism is understood and perceived and evaluates what constitutes cultural tourism in your country. The second provides information on your needs and priorities for cultural tourism development and tourism and culture partnership. Please answer the questions below and provide examples/share experiences, where relevant, that apply to your country.

UNWTO shall use and publish the information collected from the survey in projects and/or activities carried out for official purposes of the Organization.

Who should answer the survey?

In view of the importance of the results of the current survey, it is highly recommended that this questionnaire be filled out by the **official focal point in the government tourism authority** (with the support of other appropriate officials). One submission per country is required.

When is the deadline?

In order to allow sufficient time for the analysis of the responses, UNWTO Member States are requested to fill in the present questionnaire online by **15 December 2015**.

In case you have any questions or comments, please contact oftc@unwto.org.

What constitutes cultural tourism in your country?

Regarding views on what cultural tourism means, there is currently no internationally agreed definition. Cultural tourism is generally understood as tourism related to culture or motivated by culture, but here you may include or exclude any relevant area for the purpose of answering the survey questions.

Cultural heritage can be divided into tangible heritage and intangible heritage. UNESCO's definition of tangible heritage includes buildings and historic places, monuments, artefacts, etc.,

1 UNWTO/UNESCO World Conference on Tourism and Culture: Building a New Partnership, in Siem Reap, Cambodia, 4 to 6 February 2015.

2 Preparation of the general programme of work for 2016-2017, Survey on Member States' priorities conducted in October-November 2014.

which are considered worthy of preservation for the future. These include objects significant to the archaeology, architecture, science or technology of a specific culture.

“Intangible cultural heritage” is defined in the UNESCO Convention for the Safeguarding of Intangible Cultural Heritage (2003) as the practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artefacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals, recognize as part of their cultural heritage.

1. **Which of the following areas related to tourism do you include in the category of cultural tourism?**

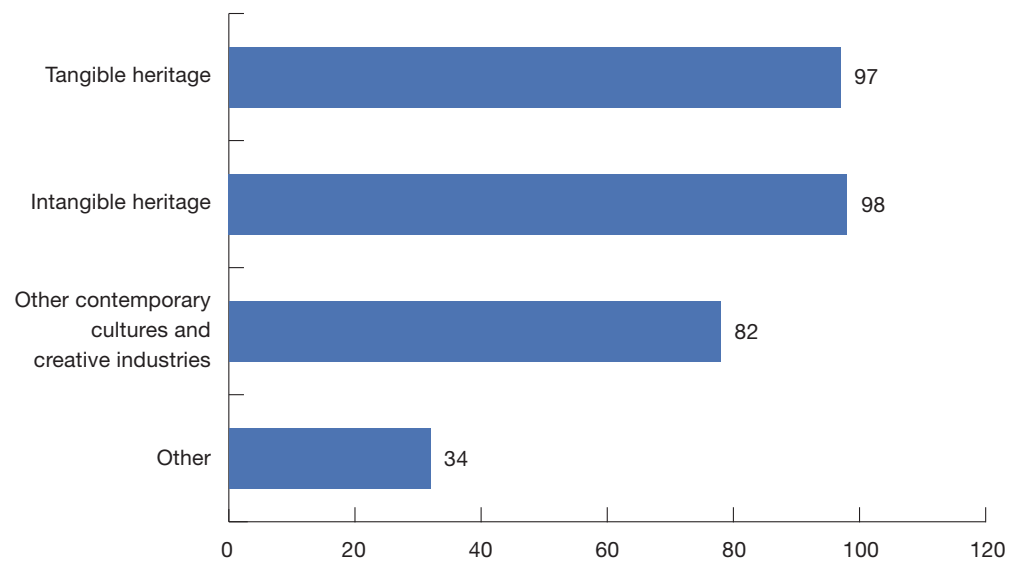
Please select all that apply:

- ☐ Tangible heritage (e.g., national and world heritage sites, monuments, historic places and buildings, underwater archaeology...)
- ☐ Intangible heritage (e.g., handicrafts, gastronomy, traditional festivals, traditional music, oral traditions, religion...)
- ☐ Other contemporary cultures and creative industries (e.g., film, performing arts, design, fashion, new media...)
- ☐ Other (e.g., sports, education, health, shopping...)

Please elaborate if necessary:

Results for question 1:

Figure I.2 **Areas included in definitions of cultural tourism (%)**



Notes: Multiple responses were possible.

Tangible heritage: e.g., national and world heritage sites, monuments, historic places and buildings, underwater archaeology.

Intangible heritage: e.g., handicrafts, gastronomy, traditional festivals, traditional music, oral traditions, religion.

Other contemporary cultures and creative industries: e.g., film, performing arts, design, fashion, new media.

Other: e.g., sports, education, health, shopping.

1.1 In your country, how important are the following areas related to tourism?

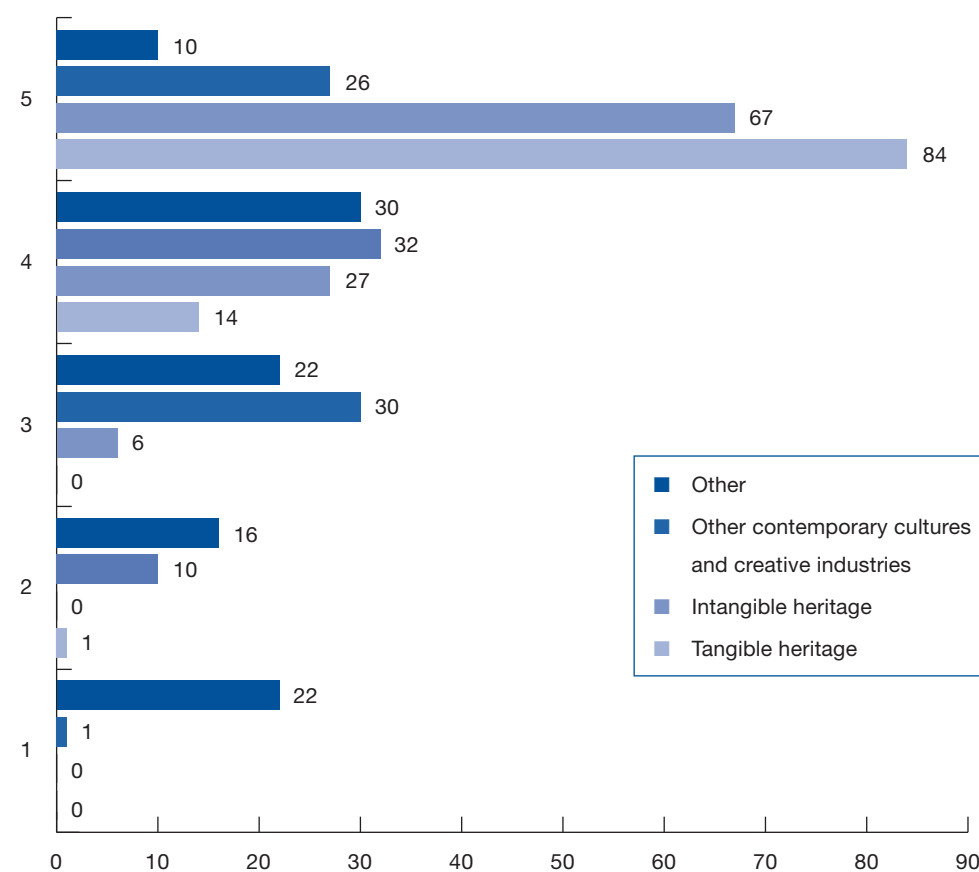
Please rate from 1 to 5 (1 being not important and 5 very important).

	1	2	3	4	5
Tangible heritage					
Intangible heritage					
Other contemporary cultures and creative industries					
Other					

Please elaborate:

Results for question 1.1:

Figure I.3 Importance of tangible and intangible heritage and contemporary culture resources (%)



Notes: Multiple responses were possible.

Tangible heritage: e.g., national and world heritage sites, monuments, historic places and buildings, underwater archaeology.

Intangible heritage: e.g., handicrafts, gastronomy, traditional festivals, traditional music, oral traditions, religion.

Other contemporary cultures and creative industries: e.g., film, performing arts, design, fashion, new media.

Other: e.g., sports, education, health, shopping.

2. The size of the cultural tourism market

It is not easy to measure the size of the cultural tourism market from the existing tourism data, but it would be useful to estimate it if possible.

The following questions are basically structured into 2 parts: inbound tourists and domestic tourists.

If data are not available for questions 2.1 to 2.2.3, please write N/A.

Part 2.1: Inbound tourists (cultural tourism)

2.1 **Please estimate the size of the cultural tourism market** (the percentage of inbound tourists accounted for by cultural tourism to your country in 2014).

2.1.1 **Has the estimated size of your cultural tourism market increased, decreased or stayed the same in your country, in the past 5 years** (5-year period from 2010–2014)?
By what percentage?

2.1.2 **What are the main reasons why the size of cultural tourism market has increased or decreased, or remained the same in your country?**

2.1.3 **When it comes to the size of the cultural tourism market above, we have not included inbound same-day visitors or domestic tourism.**

Could you estimate the size of the market of same-day visitors in comparison with the size of the cultural tourism market above, please comment:

Part 2.2: Domestic tourists (cultural tourism)

2.2 **Please estimate the size of the domestic cultural tourism market** (the size of domestic tourists accounted for by cultural tourism in your country in 2014).

2.2.1 **Has the estimated size of the domestic cultural tourism market increased, decreased or stayed the same in your country, in the past 5 years** (5-year period from 2010–2014)?
By what percentage?

2.2.2 **What are the main reasons why the size of domestic cultural tourism market has increased or decreased, or remained the same in your country?**

2.2.3 **Could you estimate the size of the market of same-day visitors in comparison with the size of the domestic cultural tourism market above, please comment:**

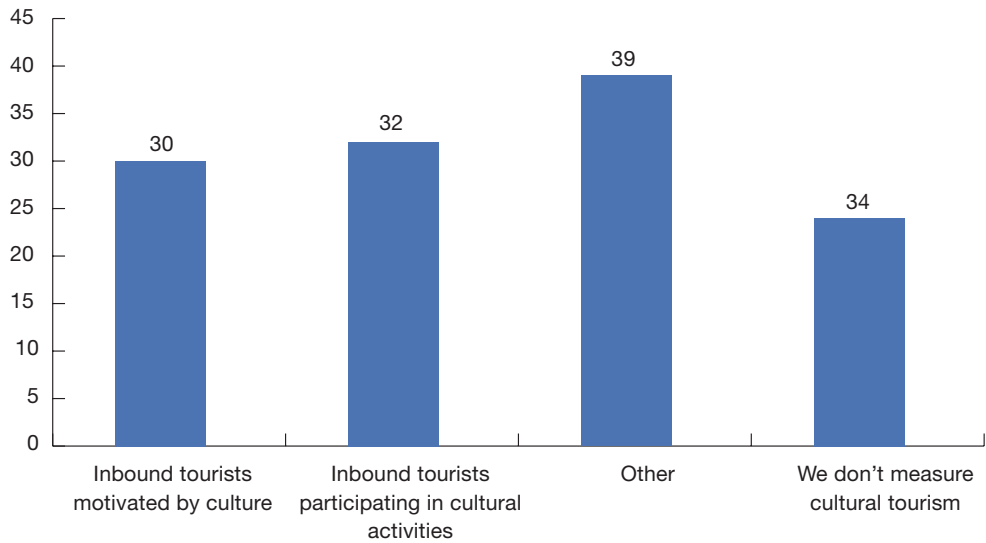
3. **What measures do you use to estimate the current size of the cultural tourism market in your country?**

- ☐ Percentage of inbound tourists motivated by culture (go to 3.1, 3.2)
- ☐ Percentage of inbound tourists participating in cultural activities (go to 3.3)
- ☐ Other (go to 4)
- ☐ We don't measure cultural tourism (go to 4)

Please elaborate if necessary:

Results for question 3:

Figure I.4 **Measures used to estimate the current size of the cultural tourism market (%)**



Note: Multiple responses were possible.

3.1 **What is the percentage of tourists whose primary visit motivation is culture in your country? (% of total inbound tourists).**

3.2 **What is the percentage of tourists whose secondary visit motivation (if available) is culture in your country? (% of total inbound tourists).**

- 3.3 **What is the percentage of tourists who participate in a cultural activity in your country?** (% of total inbound tourists).

What are your needs and priorities?

4. **Does cultural tourism have a specific place within the tourism policy of your country?**

☐ Yes

☐ No (go to 4.2)

Results for question 4:

Yes 90%

No 10%

- 4.1 **If yes, how important is cultural tourism within your tourism policy?**

Please rate from 1 to 5 (1 being not important and 5 very important).

☐ 1

☐ 2

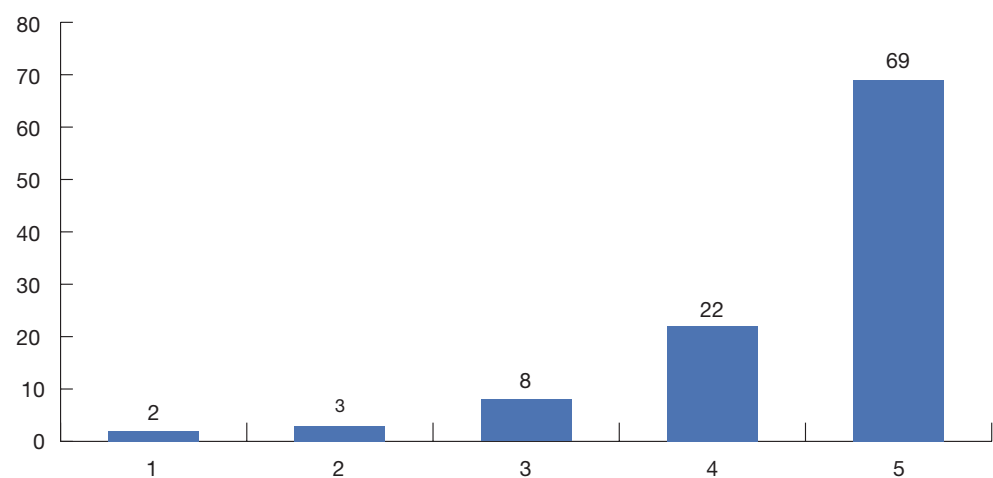
☐ 3

☐ 4

☐ 5

Results for question 4.1:

Figure I.5 **Importance of cultural tourism within the country's tourism policy (%)**



Note: 1 = low importance; 5 = high importance.

- 4.2 **Please provide a brief description of the main objectives of your tourism policy and instruments applied.**

(Please attach any relevant information or document to your reply to this questionnaire.)

Upload file:

5. **Does cultural tourism have a specific place in the marketing and promotional plan of your country?**

- ☐ Yes
☐ No (go to 6)

Results for question 5:

Yes 85%

No 15%

- 5.1 **If yes, please provide a brief description of the main objectives identified and related programmes or actions.**

(Please attach any relevant information or document to your reply to the questionnaire.)

Upload file:

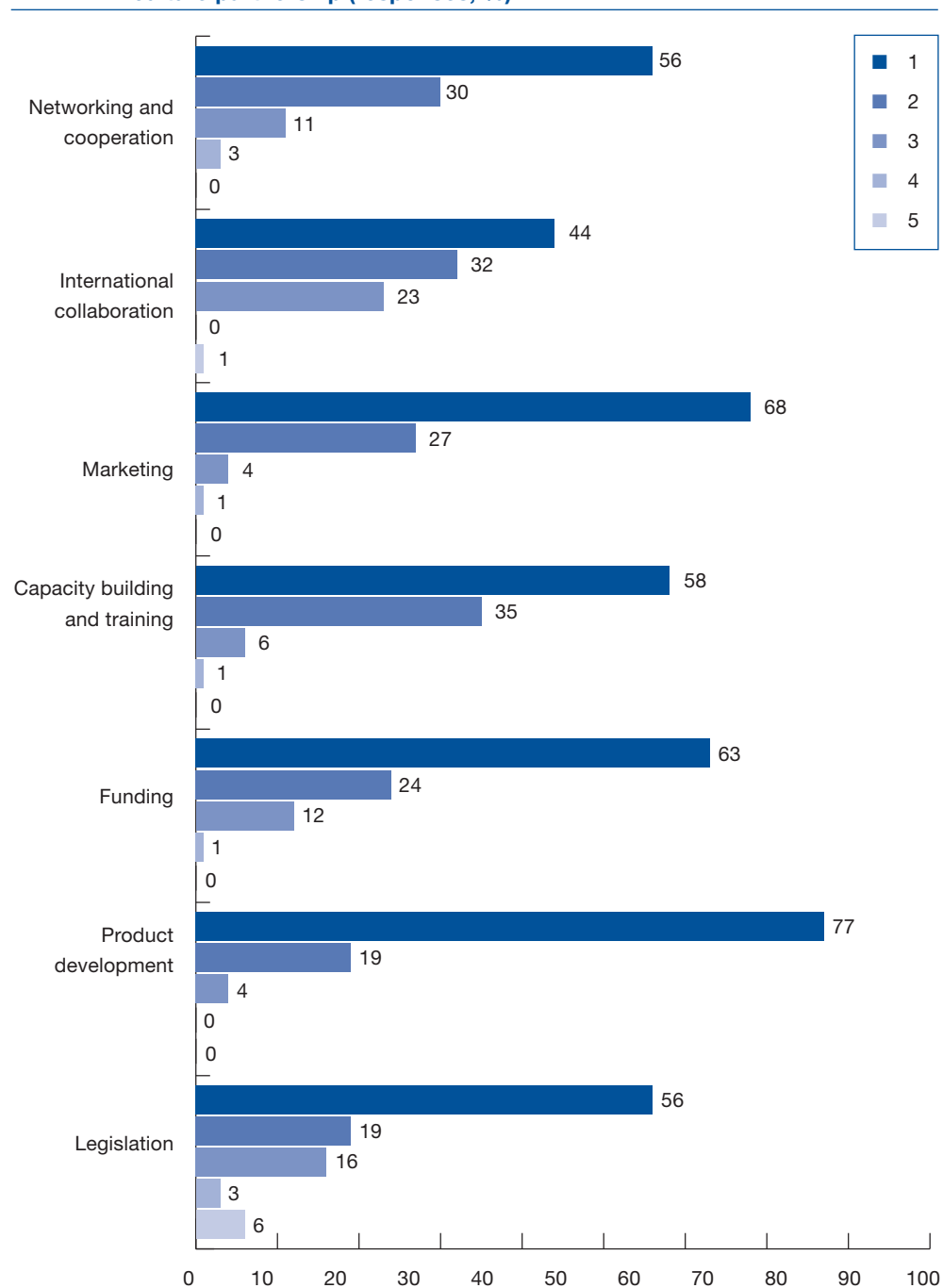
6. **As recognized in the Siem Reap Declaration, adopted at UNWTO/UNESCO World Conference on Tourism and Culture in Cambodia, it seems crucial to develop, coordinate and implement tourism and cultural policies and practices in an integrated manner.**

How important are the following types of support in the cultural tourism development and tourism and culture partnership?

Please rate from 1 to 5 (1 being not important and 5 very important).

	1	2	3	4	5
Legislation					
Product development					
Funding					
Capacity building and training					
Marketing					
International collaboration					
Networking and cooperation					

Other, please elaborate:

Results for question 6:**Figure I.6 Types of support in the cultural tourism development and tourism and culture partnership (responses, %)**

Note: 1 = low importance; 5 = high importance.

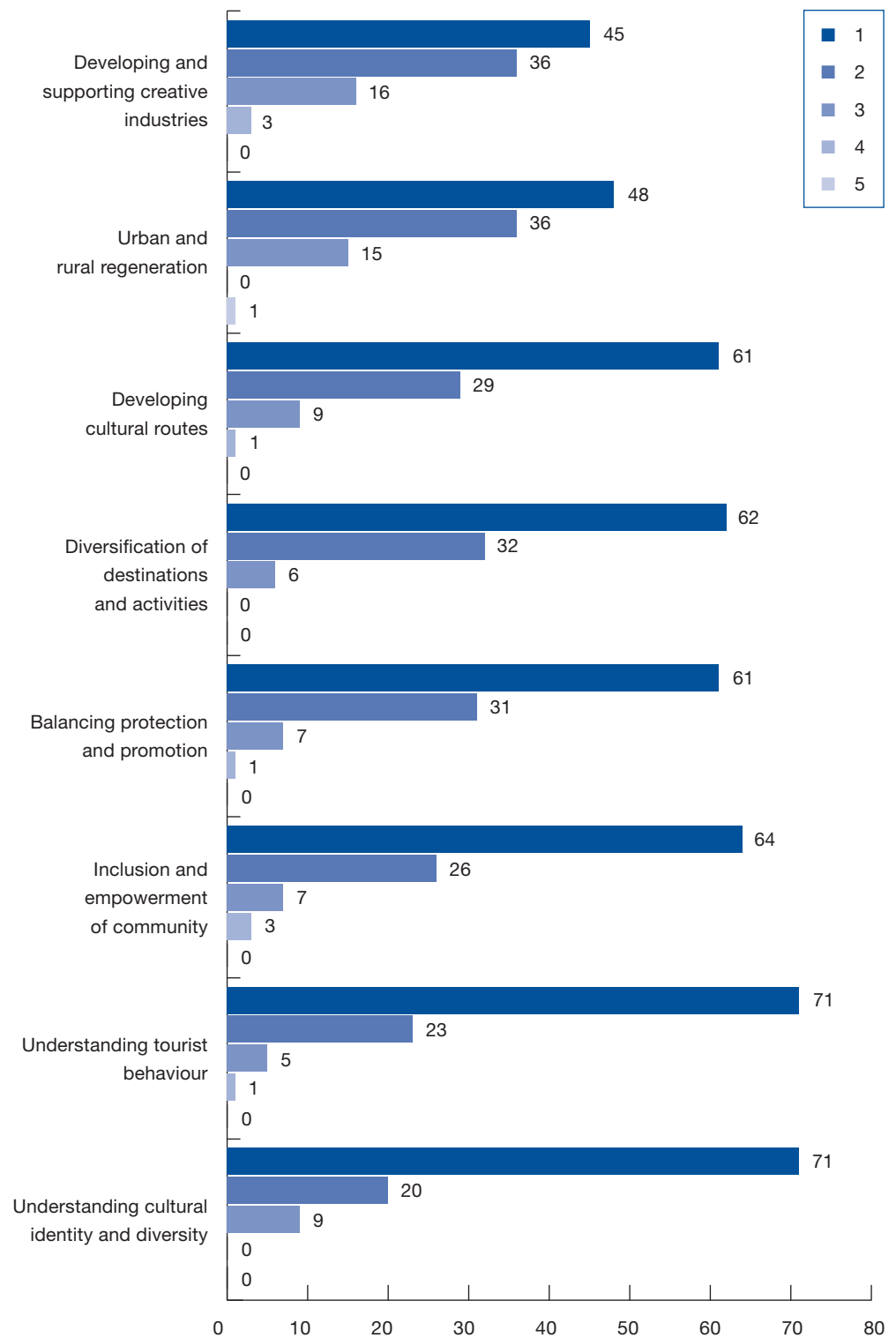
7. **How important are the following agendas in the cultural tourism development and tourism and culture partnership?**

Please rate from 1 to 5 (1 being not important and 5 very important).

	1	2	3	4	5
Understanding cultural identity and diversity					
Understanding tourist behaviour					
Inclusion and empowerment of community					
Balancing protection and promotion					
Diversification of destinations and activities					
Developing cultural routes					
Urban and rural regeneration					
Developing and supporting creative industries					

Other, please elaborate:

--

Results for question 7:**Figure I.7 Agendas in the cultural tourism development and tourism and culture partnership (responses, %)**

Note: 1 = low importance; 5 = high importance.

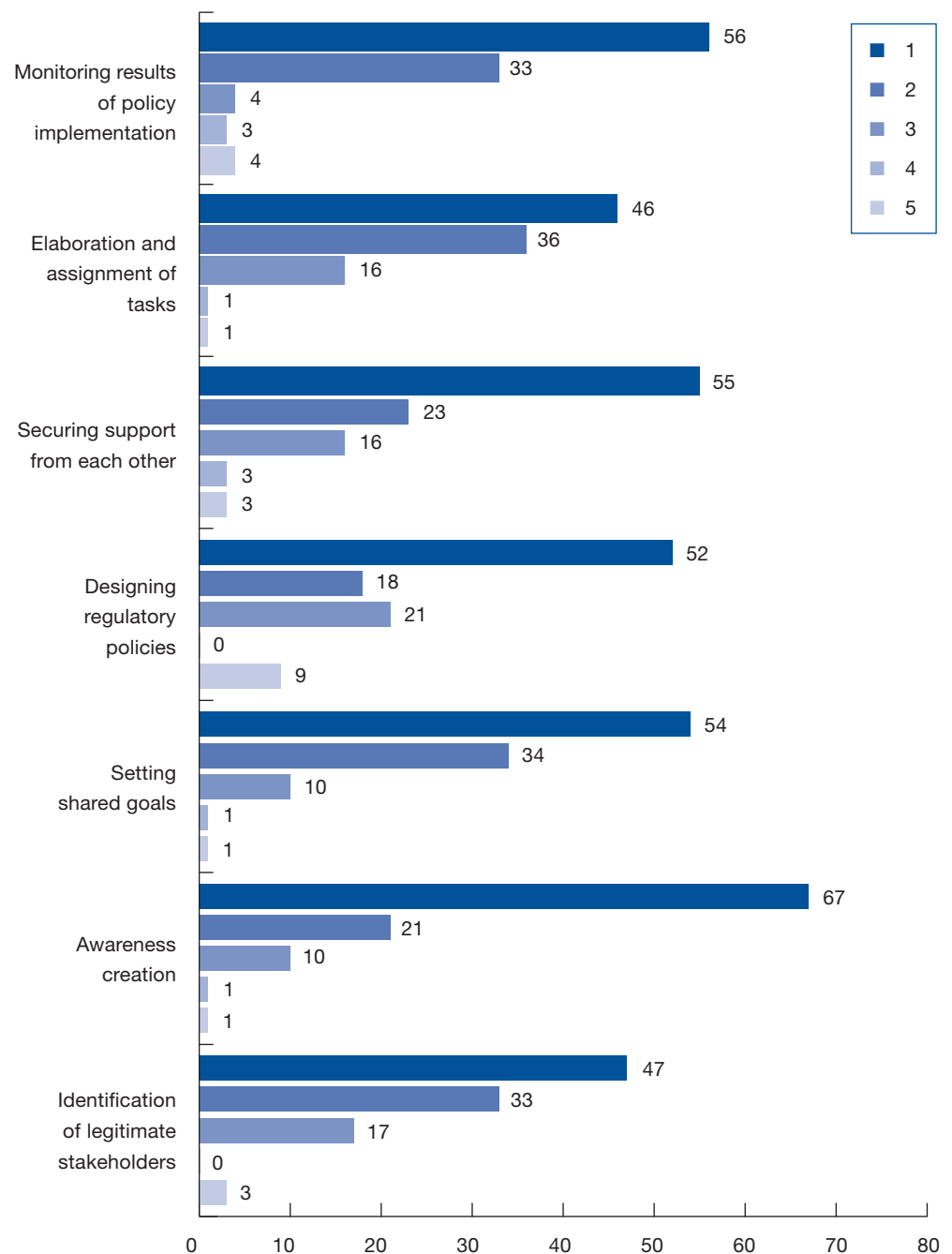
8. **Which of the following stages of collaboration process between tourism and culture are important to your country?**

Please rate from 1 to 5 (1 being not important and 5 very important).

	1	2	3	4	5
Identification of legitimate stakeholders					
Awareness creation					
Setting shared goals					
Designing regulatory policies					
Securing support from each other					
Elaboration and assignment of tasks					
Monitoring results of policy implementation					

Other, please elaborate:

--

Results for question 8:**Figure I.8 Stages of collaboration process between tourism and culture (%)**

Note: 1 = low importance; 5 = high importance.

9. **Please feel free to share any good practices of cultural tourism development and tourism and culture partnership in your country.**

(Please attach any relevant information or document to your reply to the questionnaire.)

Upload file:

10. **Please feel free to share any comments on needs and priorities related to the cultural tourism development and tourism and culture partnership in your country.**

(Please attach any relevant information or document to your reply to the questionnaire.)

Upload file:

Respondent's details

Title: ☐ Mr. ☐ Ms.

Full name: _____

Country: _____

Organization: _____

Position: _____

Address: _____

Telephone/fax: _____

E-mail: _____

Thank you very much for your participation and cooperation!

I.2 Member States that responded to the survey

- | | |
|--------------------------------------|--|
| 1. Albania | 36. Lithuania |
| 2. Armenia | 37. Madagascar |
| 3. Austria | 38. Malaysia |
| 4. Azerbaijan | 39. Mexico |
| 5. Benin | 40. Montenegro |
| 6. Bhutan | 41. Myanmar |
| 7. Bosnia and Herzegovina | 42. Netherlands |
| 8. Botswana | 43. Nicaragua |
| 9. Brazil | 44. Panama |
| 10. Brunei Darussalam | 45. Papua New Guinea |
| 11. Bulgaria | 46. Paraguay |
| 12. Cambodia | 47. Poland |
| 13. Costa Rica | 48. Portugal |
| 14. Croatia | 49. Republic of Moldova |
| 15. Czech Republic | 50. Republic of Korea |
| 16. Democratic Republic of the Congo | 51. Romania |
| 17. Egypt | 52. San Marino |
| 18. El Salvador | 53. Sao Tome and Principe |
| 19. Ethiopia | 54. Saudi Arabia |
| 20. Fiji | 55. Serbia |
| 21. Germany | 56. Seychelles |
| 22. Ghana | 57. Sierra Leone |
| 23. Greece | 58. Slovenia |
| 24. Guatemala | 59. Spain |
| 25. Hungary | 60. Swaziland |
| 26. India | 61. Switzerland |
| 27. Indonesia | 62. Timor-Leste |
| 28. Iran (Islamic Republic of) | 63. Togo |
| 29. Iraq | 64. Turkey |
| 30. Israel | 65. Ukraine |
| 31. Italy | 66. United Republic of Tanzania |
| 32. Jordan | 67. Uruguay |
| 33. Kyrgyzstan | 68. Venezuela (Bolivarian Republic of) |
| 34. Lao People's Democratic Republic | 69. Zambia |
| 35. Liberia | |

Annex II

Experts questionnaire and graphical results

II.1 Expert Questionnaire on Tourism and Culture

Tourism has grown over recent decades to become one of the leading global socio-economic sectors of our times. Culture, reflected in heritage and traditions as much as in contemporary art, languages, cuisine, music, handicrafts, museums and literature, is of immeasurable value to host communities, shapes community identities, fosters respect and tolerance among people, and has become a key tourism asset, creating distinctive differences between destinations.

Cultural tourism development and tourism and culture partnership can make a significant contribution to the socio-economic development and empowerment of local communities. An increased interest in cultural tourism was expressed during several recent UNWTO events and activities.

Many countries ranked culture as a priority for the sustainable tourism development. UNWTO wants to respond effectively to the needs and priorities of these countries, related to cultural tourism development and tourism and culture partnership.

You have been selected because of your experience in this area, and as part of a global pool of experts that is being consulted. We would be glad if we could count on your participation, by sharing with us your personal expertise and opinion regarding this topic.

Your participation will be completely voluntary and your comments and opinions may be used by UNWTO and published in future reports.

If you have any questions regarding the questionnaire kindly contact oftc@unwto.org.

We thank you in advance for your collaboration and are looking forward to your online submission.

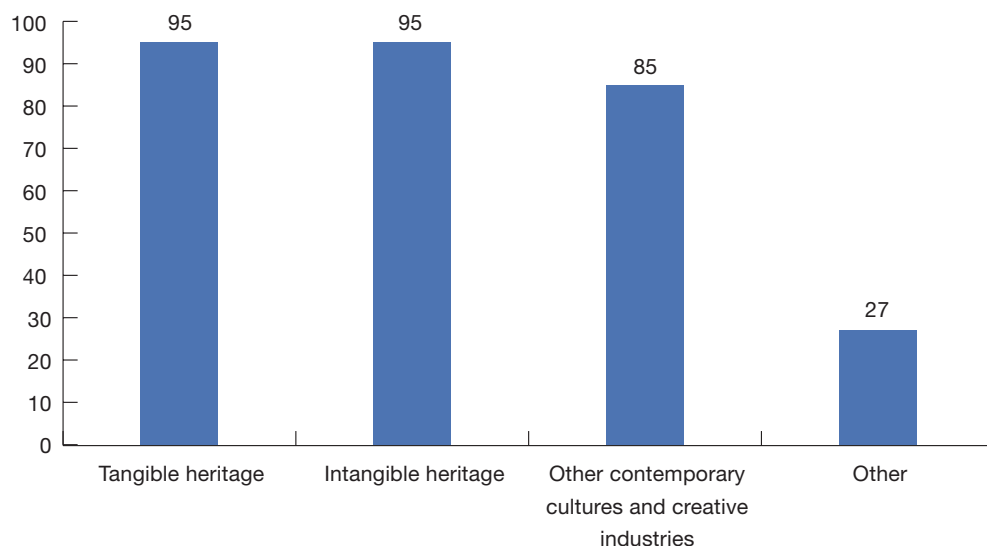
Questions

1. **Which of the following areas related to tourism would you include in the category of cultural tourism?** Please select all that apply:
 - ☐ Tangible heritage (e.g., national and world heritage sites, monuments, historic places and buildings, cultural routes...)
 - ☐ Intangible heritage (e.g., handicrafts, gastronomy, traditional festivals, music, oral traditions, religious/spiritual tourism...)
 - ☐ Other contemporary cultures and creative industries (e.g., film, performing arts, design, fashion, new media...)
 - ☐ Other (e.g., sports, education, health, shopping...)

Please elaborate:

Results for question 1:

Figure II.1 Areas to be included within the category of cultural tourism (%)



Areas to be included within the category of cultural tourism	Number of responses
Tangible heritage (e.g., national and world heritage sites, monuments, historic places and buildings, underwater archaeology...)	57
Intangible heritage (e.g., handicrafts, gastronomy, traditional festivals, traditional music, oral traditions, religion...)	57
Other contemporary cultures and creative industries (e.g., film, performing arts, design, fashion, new media...)	51
Other (e.g., sports, education, health, shopping...)	16

2. How important do you consider the following areas to be in the cultural tourism market?

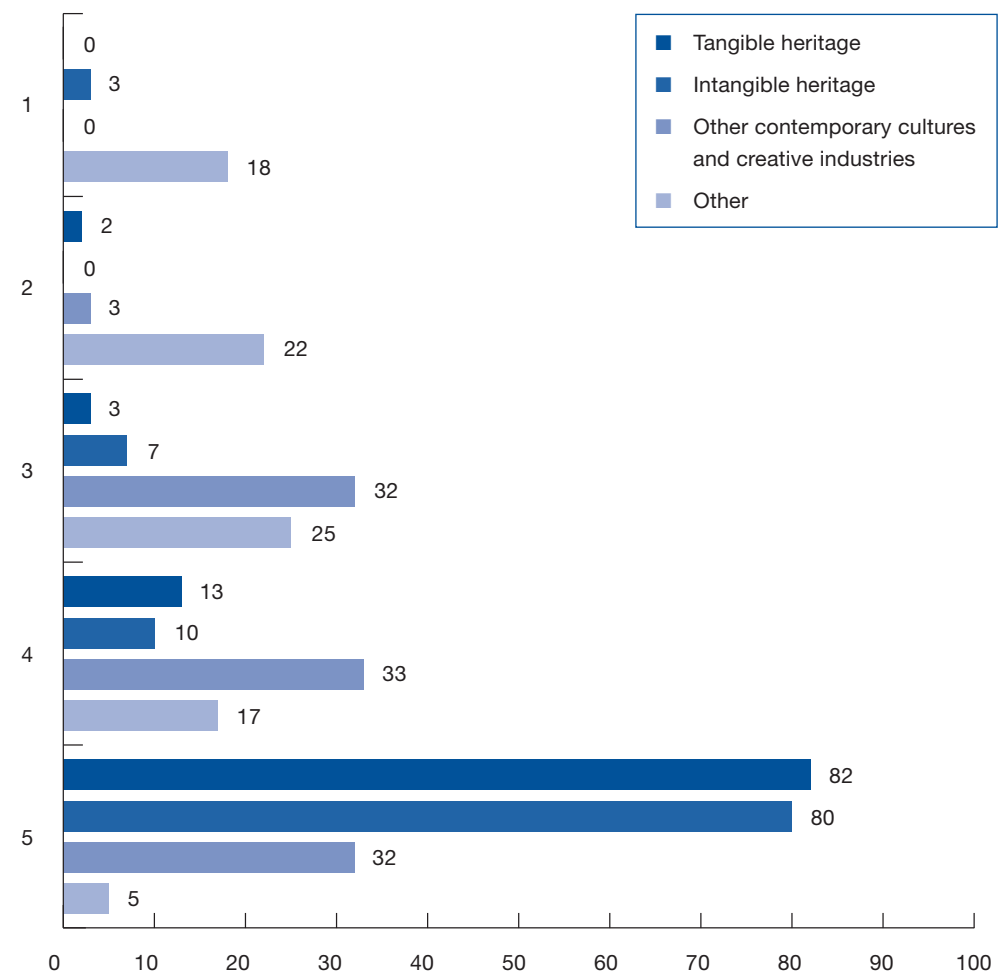
Please rate from 1 to 5 (1 being not important and 5 very important).

	1	2	3	4	5
Tangible heritage (e.g., national and world heritage sites, monuments, historic places and buildings, cultural routes...)					
Intangible heritage (e.g., handicrafts, gastronomy, traditional festivals, music, oral traditions, religious/spiritual tourism...)					
Other contemporary cultures and creative industries (e.g., film, performing arts, design, fashion, new media...)					
Other (e.g., sports, education, health, shopping...)					

Please elaborate:

Results for question 2:

Figure II.2 The importance of the following areas related to cultural tourism (%)



Notes: 1 = low importance; 5 = high importance.

Multiple responses were possible.

Tangible heritage: e.g., national and world heritage sites, monuments, historic places and buildings, underwater archaeology.

Intangible heritage: e.g., handicrafts, gastronomy, traditional festivals, traditional music, oral traditions, religion.

Other contemporary cultures and creative industries: e.g., film, performing arts, design, fashion, new media.

Other: e.g., sports, education, health, shopping.

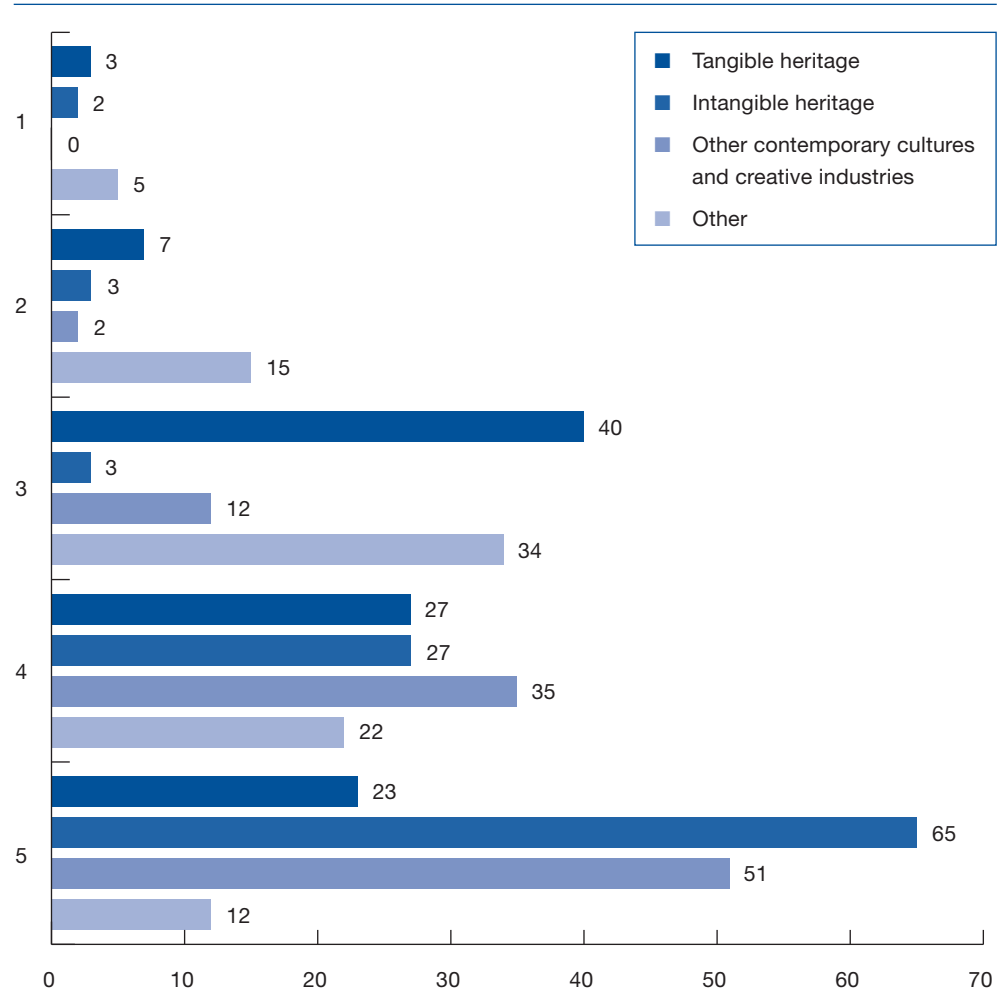
3. **Which areas do you think will increase/decrease in importance in future?**

Please rate from 1 to 5 (1 being decreased significantly and 5 increased significantly).

	1	2	3	4	5
Tangible heritage (e.g., national and world heritage sites, monuments, historic places and buildings, cultural routes...)					
Intangible heritage (e.g., handicrafts, gastronomy, traditional festivals, music, oral traditions, religious/spiritual tourism...)					
Other contemporary cultures and creative industries (e.g., film, performing arts, design, fashion, new media...)					
Other (e.g., sports, education, health, shopping...)					

Please elaborate:

--

Results for question 3:**Figure II.3 The importance of increase/decrease in the following areas related to cultural tourism in the future (%)**

Notes: 1 = low importance; 5 = high importance.

Multiple responses were possible.

Tangible heritage: e.g., national and world heritage sites, monuments, historic places and buildings, underwater archaeology.

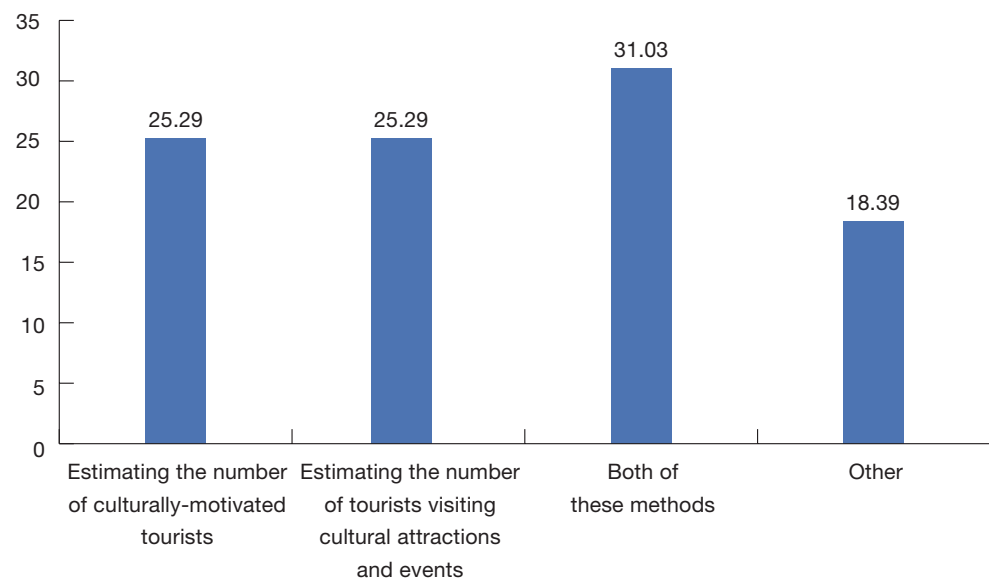
Intangible heritage: e.g., handicrafts, gastronomy, traditional festivals, traditional music, oral traditions, religion.

Other contemporary cultures and creative industries: e.g., film, performing arts, design, fashion, new media.

Other: e.g., sports, education, health, shopping.

4. **What is in your opinion the most appropriate way to measure cultural tourism?**

- ☐ Estimating the number of culturally-motivated tourists
- ☐ Estimating the number of tourists visiting cultural attractions and events
- ☐ Both of these methods
- ☐ Other, please specify

Results for question 4:Figure II.4 **Most appropriate way to measure cultural tourism (%)**

Note: Multiple responses were possible.

5. **Based on your favoured measure, what proportion of international tourism would you estimate to be 'cultural tourism'?**

- ☐ Don't know
- ☐ The percentage would be:

Please elaborate:

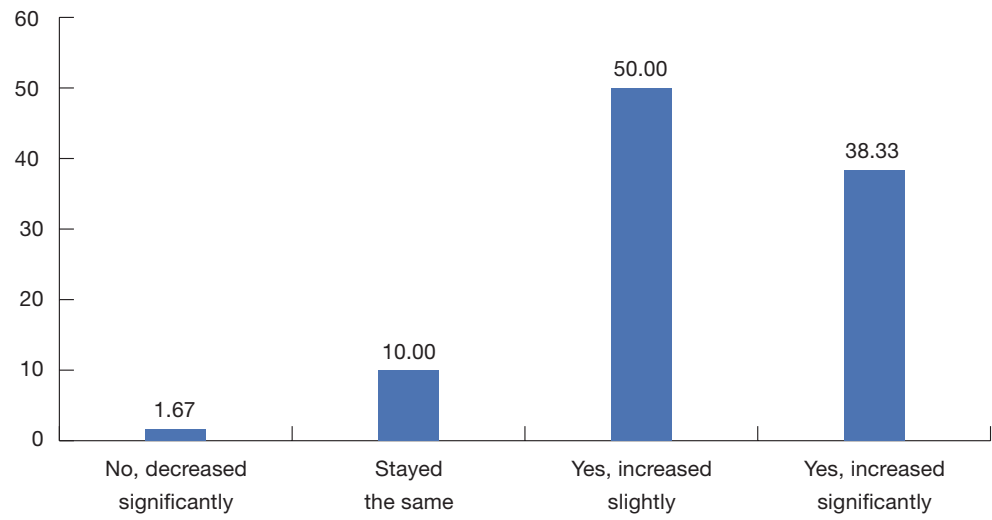
6. **Based on your favoured measure, do you think cultural tourism has grown in the past five years?**

- ☐ No, decreased significantly
- ☐ No, decreased
- ☐ Stayed the same
- ☐ Yes, increased slightly
- ☐ Yes, increased significantly

Please elaborate:

Results for question 6:

Figure II.5 Cultural tourism growth in the past five years (%)



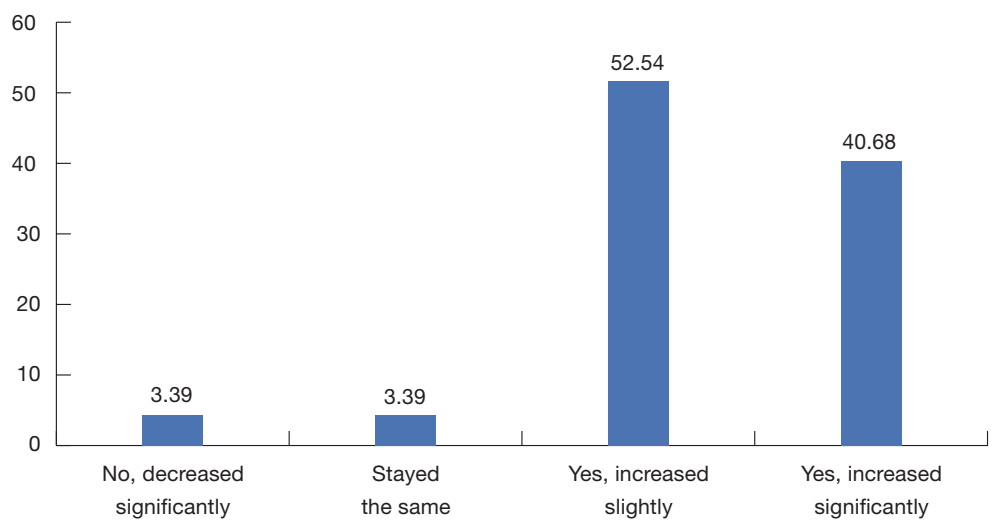
7. **Based on your favoured measure, do you think cultural tourism will grow in the next five years?**

- ☐ No, it will decrease significantly
- ☐ No, it will decrease slightly
- ☐ It will stay the same
- ☐ Yes, it will increase slightly
- ☐ Yes, it will increase significantly

Please elaborate:

Results for question 7:

Figure II.6 Cultural tourism growth in the next five years (%)



8. **What do you think should be the main objectives of cultural tourism policy in the next five years?**

Please rank in order of importance from 1 (most important) to 10 (least important).

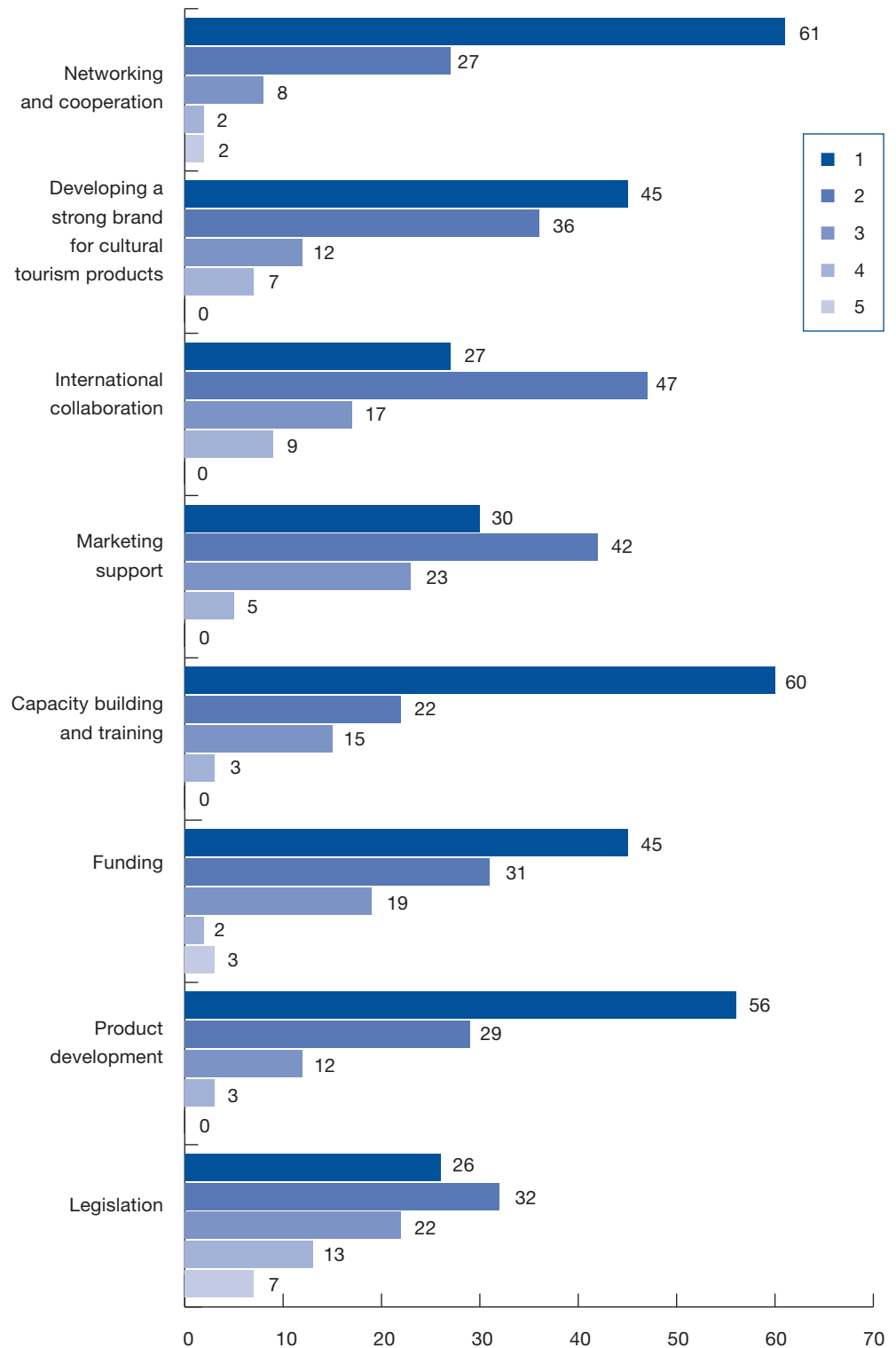
- ☐ Developing an integrated approach to the relationship between culture and tourism
- ☐ Developing and supporting the creative industries
- ☐ Developing cultural routes
- ☐ Developing better ways of measuring cultural tourism
- ☐ Developing standardized regulations for cultural tourism
- ☐ Diversification of destinations and activities
- ☐ Helping to increase community empowerment and inclusion
- ☐ Promoting cross-cultural understanding
- ☐ Promoting cultural identity
- ☐ Providing funding for cultural preservation

Please elaborate:

9. **How important do you consider the following types of support for cultural tourism development and tourism and culture partnership?**

Please rate from 1 to 5 (1 being not important and 5 very important).

	1	2	3	4	5
Legislation					
Product development					
Funding					
Capacity building and training					
Marketing					
International collaboration					
Developing a strong brand for cultural tourism products					
Networking and cooperation					

Results for question 9:**Figure II.7 Importance of types of support for cultural tourism development and tourism and culture partnership (%)**

Note: 1 = low importance; 5 = high importance.

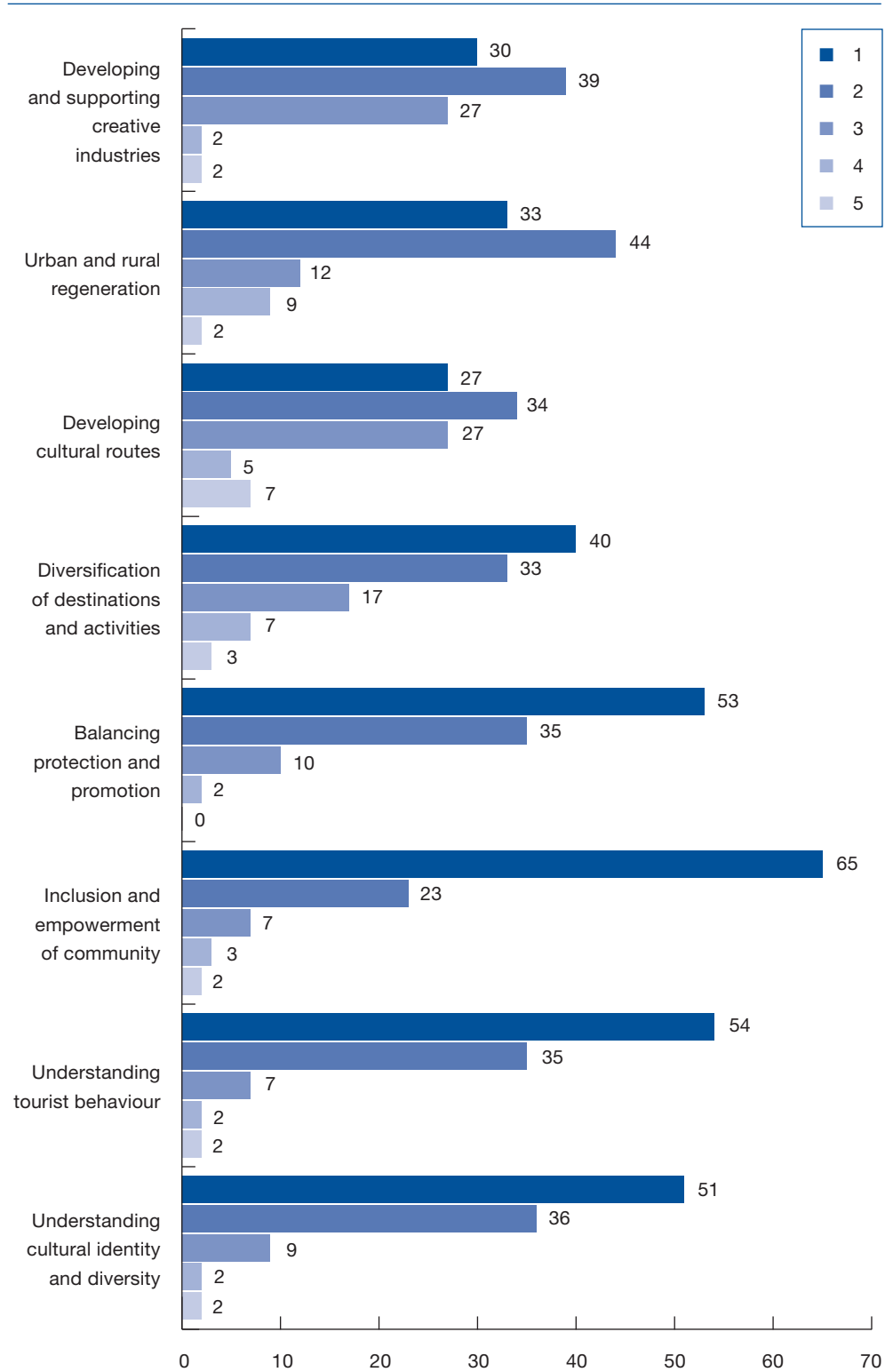
10. **How important do you consider the following agendas in the cultural tourism development and tourism and culture partnership?**

Please rate from 1 to 5 (1 being not important and 5 very important).

	1	2	3	4	5
Understanding cultural identity and diversity					
Understanding tourist behaviour					
Inclusion and empowerment of community					
Balancing protection and promotion					
Diversification of destinations and activities					
Developing cultural routes					
Urban and rural regeneration					
Developing and supporting creative industries					

Please elaborate:

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Results for question 10:**Figure II.8 Importance of following agendas in the cultural tourism development and tourism and culture partnership (%)**

Note: 1 = low importance; 5 = high importance.

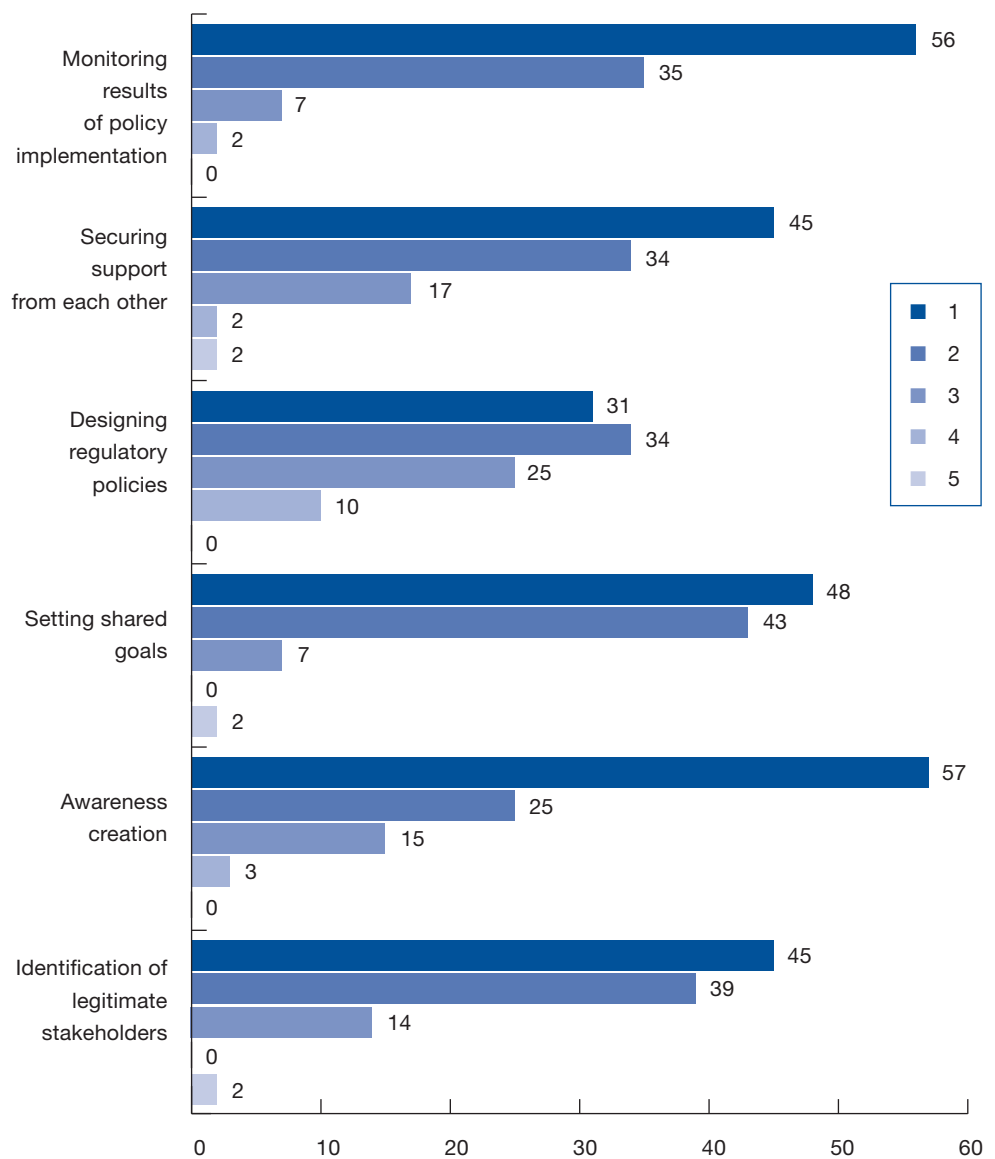
11. **How important are the following actions in supporting culture and tourism partnership?**

Please rate from 1 to 5 (1 being not important and 5 very important).

	1	2	3	4	5
Identification of legitimate stakeholders					
Awareness creation among stakeholders					
Setting shared goals					
Designing regulatory policies					
Securing support from each other					
Monitoring results of policy implementation					

Please elaborate:

--

Results for question 11:**Figure II.9 Specific actions to support tourism and culture partnership (%)**

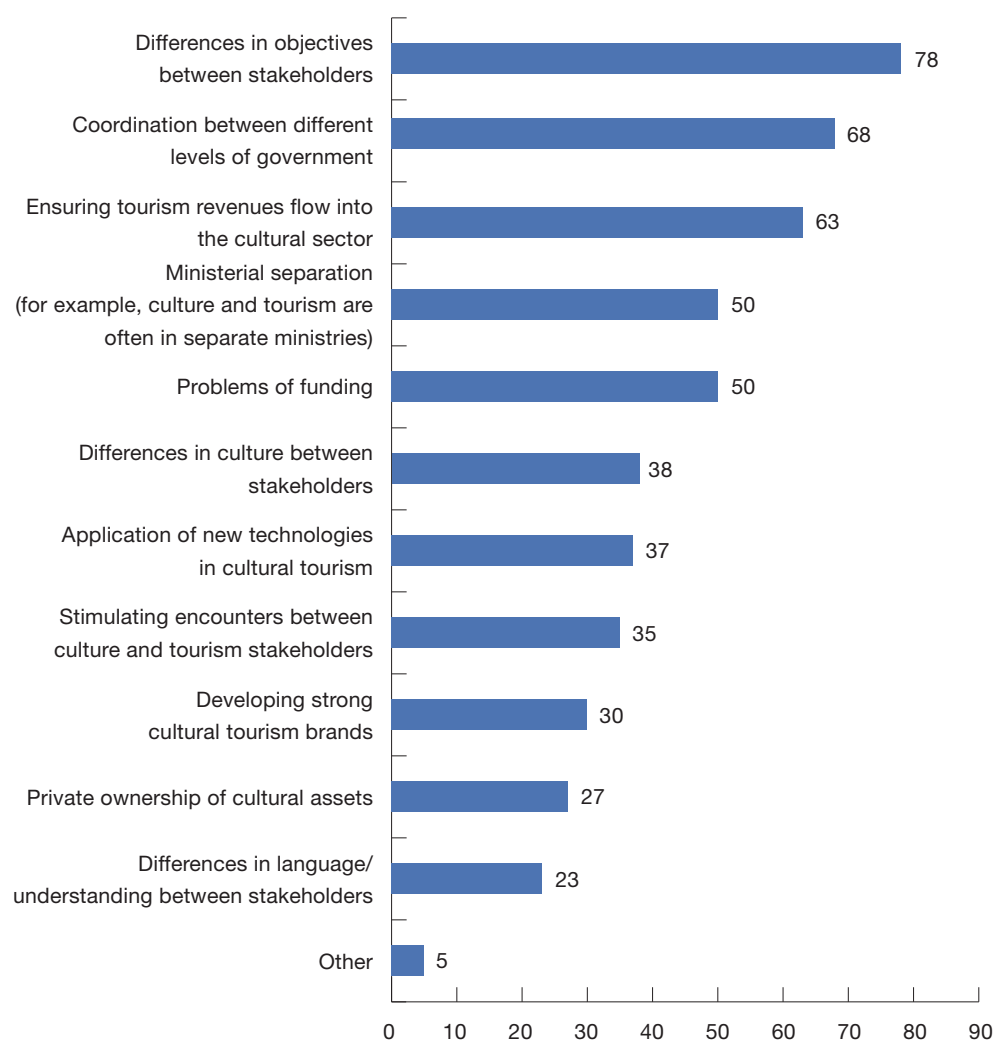
Note: 1 = low importance; 5 = high importance.

12. **What do you see as the main challenges or barriers to culture and tourism collaboration?**

- ☐ Differences in objectives between stakeholders
- ☐ Differences in culture between stakeholders
- ☐ Differences in language/understanding between stakeholders
- ☐ Problems of funding
- ☐ Coordination between different levels of government
- ☐ Ministerial separation (for example, culture and tourism are often in separate ministries)
- ☐ Private ownership of cultural assets
- ☐ Stimulating encounters between culture and tourism stakeholders
- ☐ Ensuring tourism revenues flow into the cultural sector
- ☐ Application of new technologies in cultural tourism
- ☐ Developing strong cultural tourism brands
- ☐ Other, please specify

Results for question 12:

Figure II.10 **Main challenges or barriers to tourism and culture collaboration (%)**



13. **Countries have expressed some recurring needs and priorities regarding cultural tourism, such as:**

- Public private partnership framework (privately owned heritage sites, cooperation between government and private organizations...)
- Improving awareness through proper marketing (many mentioned digital media and e-promotion)
- Developing cultural routes (especially European countries)
- Creating better policies to protect cultural heritage
- Securing funding and investors for projects (could be used to developing a tourism product, a marketing campaign, training local communities...)
- Participation of local communities and training courses

In your opinion how can any of these needs and priorities be answered?

Please attach any relevant information or document:

Respondent's details

Full name:

E-mail:

II.2 Experts that responded to the survey

- | | |
|---|----------------------------------|
| 1. Adams, Sarah | 32. Marques, Lenia |
| 2. Al Ismaili, Issa Sultan | 33. McKercher, Bob |
| 3. Ardika, I Gede | 34. McVeigh, James |
| 4. Bao, Jigang | 35. Mendiratta, Anita |
| 5. Bartos, Patrick | 36. Merino, Fatima |
| 6. Bassa, Lia | 37. Mfuné, Matthews Dontone |
| 7. Bouchenaki, Mounir | 38. Millar, Sue |
| 8. Couret, Caroline | 39. Nyul, Erika |
| 9. De Delás, Ignacio | 40. Paiva, Odete |
| 10. Du Cros, Hilary | 41. Peralta, Alberto |
| 11. Dupeyras, Alain | 42. Ramos, Carmen Maria |
| 12. Erkan, Yonca | 43. Richards, Peter Edward |
| 13. Esper, Federico | 44. Rodolfo, Maria Cherry Lyn S. |
| 14. Ferreira Carvalho, Rui Miguel | 45. Ruhanen, Lisa |
| 15. Friel, Martha | 46. Saidi, Habib |
| 16. Frustier, Pierre | 47. Santorun Ardone, Ana |
| 17. Gallego Revilla, José Ignacio | 48. Schluter, Regina |
| 18. García de León, Martín Gómez Ullate | 49. Shinde, Kiran Ajit |
| 19. Ghaderi, Zahed | 50. Soutto, Carlos |
| 20. Gomez, Llanos | 51. Stoeva, Daniela |
| 21. Graburn, Nelson | 52. Thorne, Steven |
| 22. Gunawan, Myra P. | 53. Touza, Alexandra |
| 23. Gupta, Bharti | 54. Tresserras, Jordi |
| 24. Hall, Michael | 55. Velasco, Maria |
| 25. Hart Robertson, Margaret Jean | 56. Vesterinen, Nina |
| 26. Hernandez, Frances Santiago | 57. Williams, Tim |
| 27. Hoang, Dao Bao Cam | 58. Wisansing, Jutamas |
| 28. Jelincic, Daniela Angelina | 59. Wurzbürger, Rebecca |
| 29. Keren, Donna J. | 60. Zarate Angel, Diana Areli |
| 30. Leyva, Giovanni Flores | 61. Zhang, Guangrui |
| 31. Lopez, Alejandro | |

Annex III

Good practice cases

Albania

- Albania is developing a marketing strategy with a focus on cultural tourism and how to develop it further with inter-ministerial collaboration and other specific actions. The ‘Culture Marketing Strategy for Albania’ is being prepared against a background to (and as a component of) the Joint UNDP – UNESCO Culture and Heritage for Social and Economic Development Programme.
- Butrint National Park, an Albanian cultural tourism product, has been a UNESCO World Heritage Site since 1992. In recent years, and due to increased Tourist traffic Butrint was added to the UNESCO list of World Heritage in Danger. However, in 2005, with the joint effort of Albanian institutions, the Butrint Foundation, the World Bank and UNESCO, it was removed from the list. . The different investments and projects realized in the Park during the years, for example from USAID, World Bank, AADF (Albanian-American Development Fund), etc. have contributed to a further improvement of the infrastructure of the park, making it more accessible and more attractive to visitors.

Austria

- *Austria developed the European Cultural Routes, A Practical Guide*. A handbook, published by the Federal Ministry for European and International Affairs, that shows what one must do in order to launch a cultural route.
- *Imperial Austria* is a good example of an association that grouped the leading companies of the historical heritage in Austria. It works together to showcase a number of organizations and institutions that represent the history of the imperial family and its accomplishments (see: www.imperial-austria.at).

Azerbaijan

- Azerbaijan proposed a number of international historical and cultural routes, which are now ready for international certification in collaboration with the European Institute of Cultural Routes. These include the Wine Tour, Great Silk Way, Alexander Dumas in Caucasus, reflecting the variety of tastes and preferences.
- Azerbaijan created a tradition of announcing cultural and art capitals of the country in various areas, for each year. For instance, in year 2012 Masalli was declared as the “Capital of folklore”, Guba the “Capital of Crafts” and Gedabek the “Capital of Legends”. Also, Baku was announced the Capital of Islamic Culture for the year 2009 by the Organisation of Islamic Conference (OIC). In line with the declaration of capitals, many activities were taken into consideration in the national tourism strategy that will cover the period of the next 10 years.
- Different regions and cities in Azerbaijan hosted international music and entertainment festivals and holidays on different subjects. Goychay Pomegranate Festival, Annual Apple Festival held in Guba and many others could be shown as examples. Currently the Ministry of Culture and Tourism of the Republic of Azerbaijan is working to shape these events as a main tool for attraction in close collaboration with the cultural institutions.

Benin

- Cultural tourism has an important place in the National Tourism Policy 2013-2025 developed by United Nations Development Programme. UNESCO inscribed the site of the royal palaces of Abomey on the UNESCO list of World Heritage (1985), and the Gelede ceremony on the Representative List of the Intangible Heritage of Humanity (2001).
- The Vodun festival celebration on 10 January, the rehabilitation of the royal palaces, the rehabilitation of museums, and the organization of annual cultural festivals are good practices of cultural tourism development and tourism and culture partnership.

Bosnia and Herzegovina

Bosnia Herzegovina and USAID Cluster Competitiveness Activity (CCA) developed a cultural tourism initiative to help bridge the divide between culture and commerce through structural improvements, collaborative strategies, incentives, and capacity building.

Botswana

The Private Sector joined hands with the Government in trying to promote cultural tourism by sponsoring some of the annual cultural events across the country.

Brazil

Brazil collected data on trips by leisure travellers motivated by cultural tourism in the international tourist demand survey.

Brunei Darussalam

- Brunei Tourism Master Plan identified and decided to optimize two main clusters to drive growth under the primary offerings – Nature and Culture, and Islamic heritage to be supported by secondary offerings. A total of 25 initiatives and 69 projects were identified to drive tourism growth to increase visitor spending, visitor arrivals; investment and tourism-related employment.
- Brunei Darussalam developed a trail for heritage site in Bandar Seri Begawan.

Bulgaria

- The Ministry of Tourism developed 8 thematic cultural itineraries that is promoted as Cultural-Historical destinations.
- The Ministry of Tourism newly created Online Register for Tourist Attractions in Bulgaria, which highlights 3300 sites throughout the country.
- Cultural tourism is the main focus in the 2015 Annual Program for National Tourism Promotion.
- “EU Cultural Routes in the Middle and Lower Danube – “The Roman Emperors Route and The Danube Wine Route” project activities focused on developing an integrated communication and marketing strategy and creating networks of stakeholders along the Danube (national, regional and local administrations and tourism authorities, development agencies, private businesses etc.).

Congo, The Democratic Republic of

Some examples of good practices from the Democratic Republic of Congo are: Gungu Festival (August), International Festival of Laughter “Toseka “, cycling tour of the DRC, and other visits eg; the Laurent Kabila fire stations , office of the Prime Ministers of the DRC (since independence), Mausoleum of Laurent Kabila, the residence of the First President of the country (Joseph Kasavubu), fire monument of Prime Minister Lumumba (at the interchange of Limete), the establishment of the school of tourism and the organization of the market for artists and artisans.

Costa Rica

The development of tourism Expoferias program for the past 17 years, in which ICT supports the promotion of traditions, customs, cuisine, crafts, dances and other artistic and popular expressions of the regions of the country is a good practice case of cultural tourism development and tourism and culture partnership.

Croatia

- The Association of Croatian Travel Agencies with the financial support of the Ministry of Tourism has organized a series of networking events in cooperation with various cultural institutions. During events, cultural institutions presented their offer and discussed with tour operators about new tourism products which can be developed together. Participants from travel agencies pointed in evaluations that this kind of event combining site visit and exchange of information in groups is very useful and inspirational for improving cooperation and development of new and different products of cultural tourism.
- The Discover Croatia programme was initiated by the Association of Croatian Travel Agencies (UHPA) with the financial support of the Ministry of Tourism. This is a comprehensive programme involving the development of at least 50 tourism agencies as competent Destination Management Companies in undeveloped areas and the development of around 2000 new special interest (thematic) tourism programmes (packages). Significant proportions of those programmes are cultural tourism products or are connected with culture. The project was chosen as the EU's best practice example for "Enhancing the competitiveness of tourism in the EU".
- Networking of travel agencies with museum, Špancirfest (see: <http://spancirfest.com/en/>), Roman Emperor Routes and Danube Wine Route (see for both: www.hgk.hr/sektor-centar/sektor-turizam/dunavske-kulturne-rute-rh-ruta-rimskih-careva-i-dunavska-vinska-ruta) are good practices of cultural tourism development and tourism and culture partnership.

Czech Republic

- Cultural tourism is a key aspect in the marketing strategy, it is thematically divided: Prague; City with a story (UNESCO etc.); Cultural landscape (area outside the city); Trips with a story (spiritual tourism); Cultural trips (thematic trips).
- Czech Traditions (see: www.tradicemasmysl.cz), Czech Specials (see: www.czechspecials.cz) and Land of Stories (see: www.ceskozemepribehu.cz) are good practices of cultural tourism development and tourism and culture partnership.

Egypt

The integration of cultural tourism, an increase in international marketing campaigns, focus on some destinations such as Luxor on marketing and infrastructure level – introducing new products (Holy Family religious cultural journey as a producer) – a special program to stimulate flights to the cities of Luxor and Aswan are good practices of cultural tourism development and tourism and culture partnership.

El Salvador

- The Mayan Culture represents an approach to one of the most advanced cultures of humanity. In El Salvador, tourists can observe the daily life of Mayan world and its inhabitants. In the Archaeological Route, Joya de Ceren was declared a World Heritage Site by UNESCO in 1993.

- Awareness development and dissemination actions about culture in colleges and universities with links with the ministry of culture of the presidency are good practice of cultural tourism development and tourism and culture partnership.

Ethiopia

Annual celebration of the founding of the true cross is a good practice of cultural tourism development and tourism and culture partnership.

Fiji

- The Fijian Made-Buy Fijian campaign was launched in 2011 by the Fijian Government which provides a national brand.
- There are eight representations, one of which is the Fijian crafted emblem that stands for authenticity, quality, craftsmanship and exclusivity of crafted products. Each Fijian crafted item has a story to tell; it is a visual representation of the unique Fijian culture that embodies history, memory and myth.
- The Ministry of Industry, Trade and Tourism works closely with the Fiji Arts Council in identifying authentic Fijian crafters and artisans to brand authentic Fijian handicrafts, whilst at the same time identifies markets for crafts which include the tourism industry. Currently there are 176 companies registered with the Ministry that market Fijian Crafted products.
- Other initiatives driven by the Ministry include the hosting of the Fijian Crafted Village in major tourism events, showcasing the authentic diverse cultural handicrafts. These events include the Fijian Tourism Expo.
- The Ministry established a Memorandum of Understanding and Memorandum of Agreement with a number of countries including aspects of cultural exchange opportunities particularly in the form of training and capacity building.
- The Ministry also works closely with the Department of Culture in projects that promote and enhance cultural tourism. These include projects such as the World Heritage Site of Fiji's old capital – Levuka.
- Through the Fijian Tourism Development Plan 2021, strategies will be implemented for the rejuvenation of existing natural and cultural attractions and establishment of new ones.

Germany

- The Ministry has commissioned a project entitled "The Destination as a stage: How does cultural tourism make rural regions successful?", which is exploring how culture and tourism in rural areas can be brought together. The project will take place across three pilot rural travel regions and will seek to analyse specific problems on the ground. The model solutions and experience gained in the pilot regions will then be available to be used by other regions across Germany.
- Promoting and marketing Germany as an attractive destination for cultural tourism is one of the key priorities in the tourism policy of the German National Tourist Board (see: www.germany.travel). One of the marketing focuses of the German National Tourist Board is the megatrend of 'cultural tourism' and the product line of 'city and cultural tourism' associated with this.

In addition to the basic topics that make up the core focus of the marketing and communication activities of the German National Tourist Board, the Board also runs a number of global campaigns, both past and future – focussed on strengthening cultural tourism in Germany.

Ghana

- The realignment of the portfolio of culture and creative arts to the tourism ministry since 2013 is a major effort by the government to promote cultural tourism, as cultural issues are developed in collaboration with key stakeholders and practitioners including the national house of chiefs and traditional authorities.
- In furtherance of this, the ministry has created a good rapport and strengthened collaboration between the tourism private sectors and culture private sectors represented by the Ghana tourism federation (GHATOF) and Ghana culture forum. The two organizations are the apex bodies of the various tourism trade associations and the cultural practitioners' associations and groups.

Greece

Digitization of museums, collections, and archives in order to improve potential visitor's interpretation and travel planning is a good practice of cultural tourism development. The new Acropolis Museum (see: www.theacropolismuseum.gr/en/content/digital-storytelling) develops narratives for visitors based on their own personal profiles.

Guatemala

There has been an expansion of cultural activities through movements that are still in an emerging state in the fields of contemporary culture and creative industries where design and fashion have gained strength through the enhancement of the use of traditional textiles of Guatemala on luxury items using a neo-artisanal trend.

Hungary

- The National Programme for Mansions and Castles was launched in 2015 in order to protect and preserve mansions and castles in permanent public ownership as well as to utilize them for the purposes of tourism. This programme enables to integrate new sites into cultural tourism and facilitates the renewal of 35 mansions and 31 castles until 2020.
- The National Tourism Development Concept of Hungary is currently under preparation. This is followed by the category of tourism products with substantial attractiveness including festival, gastronomic and religious tourism. For the implementation of the concept, it is planned to leverage EU funds. Cultural festivals and events will be financed through the domestic tendering system.

India

Heritage walks spearheaded by local people in important cultural and heritage sites, night viewing at Archaeological Survey of India/State Archaeology monuments, creation of an enabling framework for adapting privately owned heritage structures for public use on a revenue sharing basis, encouraging and providing necessary capacity building program for local communities in and around important heritage monuments to come up with homemade souvenirs for enhancing their livelihood are good practices of cultural tourism development and tourism and culture partnership.

Indonesia

Culture is one of the five pillars of "Wonderful Indonesia" programme. The policy is aimed at taking advantage of the rich cultural assets of the country to drive visitors to various tourism destinations.

Iran

The main objectives of Iran's tourism policy includes promoting Islamic culture, expanding cultural relationships with other nations and ethnic groups, presenting Iran's culture to the world and consolidating bonds and unification with other Muslim nations, and enhancing cultural tourism.

Iraq

Religious pilgrimages are given a big importance in Iraq, especially "Al Shaabaniya" (15 days before the Ramadan) and "Al Arbiniya" (40 days after the death of the Imam Hussein) when people visit "Beit Al Athar", the house of the descendents of the Prophet.

Israel

Culture is inseparable from knowledge, and therefore one of the keys to enriching the tourist experience is the quality of the tour guiding, while visiting culture related sites and events. This is the reason why there is a strong emphasis on the training of tour guides and providing them with continuing education throughout their career as tour guides. In order to maintain their license, guides need to take two workshops every year.

Italy

The size of the cultural tourism market is measured by location choice.

Jordan

- The promotion of tourism in Jordan through the main tourist attractions, publicity through social networks, issuance of bulletins and brochures, and visual promotion through short videos and films reflect the diversity of tourism products in Jordan. The cultural and heritage tourism of the most important of these products concerns Petra, one of the Seven Wonders of the World, that reflects unique archaeology, and the five legacy global sites belonging to UNESCO.
- The main objectives of marketing and promotional plans are focusing on the historical and cultural tourism product. E-marketing campaigns cover hosting bloggersinfluential media and social networks for cultural and archaeological products, thus providing media coverage. In addition, tourism conferences highlight the cultural heritage of the historical and cultural places of interest.
- Jordan is working on the creation and development of religious and adventurous tourist trails with access to cultural sites and on the expansion of services offered to tourists in historical and archaeological tourist sites and others.

Liberia

Tangible, intangible heritage and other contemporary cultures and creative industries are very significant to the development and growth of the tourism industry. In reference to that, the Ministry has set up a restoration committee within the ministry in conjunction with the Ministry of Development Planning (MFDP), which is functioning under the reference of rehabilitating tourism assets across the country.

Lithuania

- Main objectives of tourism policy are aimed at development of cultural tourism infrastructure and services, promoting thematic tourist routes and collaboration amongst various stakeholders. Cultural tourism is considered as one of the priority products in the Lithuanian

Tourism Marketing strategy for 2016–2020 and it will be introduced in all tourism marketing activities of Lithuania.

- Lithuania has a special working group on cultural tourism which unites all the stakeholders responsible for cultural tourism development.

Malaysia

- Cultural vibrancy is clearly manifested in the ongoing “Malaysia: Truly Asia” programme. In this promotion, Malaysia boasts a wide variety of Asian ethnic groups thus making it into a little Asia.
- New programmes on cultural tourism based on collaborative efforts from the government, NGOs and private sectors have been initiated and implemented successfully in 2015 such as IFTAR@KL, Malaysia International Mask Festival and the World Aborigines Festival.
- Cultural tourism has also been an important agenda under the 11th Malaysia Plan. Cultural tourism which comprises heritage sites and cultural products such as traditional dances, arts and handicrafts will be promoted to further add value to enhance the touristic experience.

Mexico

The annual “Cultural Tourism Fair Mexico FTCMEX” is jointly organized by the Ministry of Tourism and the National Council for Culture and Arts of Mexico. The FTCMEX is a showcase for the tourist-cultural offer of Mexico. The organization of this fair is an example of the cross works of these two sectors each addressing the issue of competence: tourism towards the promotion and marketing and culture for the conservation, preservation and protection of cultural heritage by taking advantage of its tourism potential. Gastronomic pavilion, a craft fair and a forum for cultural agenda are featured. In addition to displaying these strengths of the country, fostering national identity is installed, and they provide support to traditional cooks, artisans and art groups. All this is aimed towards a common objective which is the promotion of cultural tourism.

Moldova

The Action Plan of the implementation of the Tourism Development Strategy “Tourism 2020” for 2014 – 2016 also contains a component to a “develop the tourism forms that need to be propelled: cultural, gastronomic, social, sports, automobile, weekend, urban, nostalgic and ecologic tourism” and the sub-topics related to cultural tourism to develop:

- The annual cultural and tourist agenda and disseminate it through tourist information tools;
- At least 2 cultural and tourist routes in the circuit; and
- Strategy on tourist valorization of the cultural and natural reserve “Orheiul Vechi”.

Montenegro

Developing cultural tourism is one of the objectives within the Strategy of Montenegrin Tourism to 2020, with principles that have to be implemented, it is also one of the activities for 2016.

Myanmar

The main objectives of Myanmar tourism policy are as follows: Enable tourists to observe Myanmar cultural heritage and natural scenic beauty; Prevent destruction/damage of cultural heritage and natural scenic beauty due to the hotel and tourism industry.

Netherlands

Comprehensive study on cultural tourism in the Netherlands undertaken by the Dutch Tourism Board in August 2015 is a good practice of cultural tourism development and tourism and culture partnership.

Nicaragua

Identification of cultural tourism routes in the Caribbean Coast of Nicaragua is a good practice of cultural tourism development and tourism and culture partnership.

Panama

- Panama is in the process of implementing series of cultural statistics.
- Heritage sites are allocated funds for maintenance and currently under preparation to make it accessible for tourism use. Panama La Vieja – Old Town (Pacific) and Fort of San Lorenzo in the Caribbean are one of the highlighted sites.

Papua New Guinea

- Papua New Guinea travel statistics show increased arrivals during the months of July to September as a result of cultural festivals staged in various parts of the country, especially the Mask Festival, Hagen Show, Hiri Moale and the Goroka Show.
- Papua New Guinea Tourism Promotion Authority's most successful partnership projects have been the Surf Management Plan headed by the Surfers Association of PNG (SAPNG). This project aims to ensure the village communities where surfing tourism takes place receive shared benefits through fees and implement rules that limit the number of surfers to protect the environment.

Paraguay

The alliance between the national authorities of tourism and culture conduct regional meetings and jointly coordinate actions through workshops where best practices are agreed. It evaluates historical sites and monuments, encourages critical and timely citizen participation, shares and compares experiences.

Poland

- Given the development potential and competitiveness of Polish tourism products and the market trends in domestic and international tourism, the Tourism Development Programme 2020 recommends measures for the development and promotion of five priority product areas of Polish tourism, including cultural tourism (with particular emphasis on industrial tourism).
- Poland's marketing strategy for the tourism sector for 2012–2020, developed by the Polish Tourist Organisation, indicates cultural tourism as Poland's image-building product.
- The best products are selected by the Polish Tourist Organisation through a competition, and are awarded the Best Tourism Product Certificate since 2003.
- The indicative list of key projects within Measure 6.4 Investment in tourism products of supra-regional importance of the Operational Programme Innovative Economy 2007–2013 includes several projects supported by the EU structural funds relating to cultural tourism: The European Centre of Technical Culture and Industrial Tourism (the country's province: śląskie), The new adventure routes in the historic salt mine in Wieliczka (province: małopolskie), revitalization of the Elbląg Canal on the following sections: lake Drużno-Miłomłyn; Miłomłyn-Zalewo; Miłomłyn-Ostróda-Stare Jabłonki (province: warmińsko-

mazurskie), the Footsteps of Kraków's European Identity – the tourist route underneath the Main Market Square (province: małopolskie), Toruń – a Hanseatic League city on the Wisła river (province: kujawsko-pomorskie), Zamość: a UNESCO city and a Monument of Poland's History – a tourist product of the Polish economy (province: lubelskie), the South-western Cistercian Route (provinces: małopolskie, opolskie, śląskie, dolnośląskie, świętokrzyskie), the Glass Heritage Centre in Krosno (province: podkarpackie), the Interactive Centre of the History of the "Ostrów Tumski" Cathedral Island in Poznań – the cradle of statehood and Christianity in Poland (province: wielkopolskie), the Centennial Hall in Wrocław – a Centre of Innovation in Architecture and Construction (province: dolnośląskie).

Portugal

- The UNESCO World Heritage sites or other cultural assets such as the Fado and the music festivals are part of the content and storytelling associated with the communication of Portugal and included in the promotion plan.
- Best practices guide in religious heritage interpretation, in accessibility in museums and monuments, World Heritage Sites Management, that Turismo de Portugal and UNESCO work together are good practice of cultural tourism development and tourism and culture partnerships.

Romania

- The Ministry for Regional Development and Public Administration of Romania coordinates together with the Ministry of Economy, Energy and Tourism from Bulgaria, on the Priority Area 3 - Promotion of culture, tourism and people to people contacts, of the European Union Strategy for the Danube Region.
- The National Authority of Tourism participates as a partner together with organizations from Bulgaria, Georgia, Greece, Republic of Moldova, Romania, Turkey and Ukraine for the project ALECTOR. This collaborative network of multilevel actors advocates quality standards for heritage tourism on cross border levels and focuses on different types of tangible-intangible heritage categories and their values as main lever to invest in human capital and innovation in an effort to achieve stronger regional partnerships and cooperation in the Black Sea and create quality cross border tourist products.
- The National Authority of Tourism and the Ministry of Culture with the support of the CoE developed several national and international cultural routes.

San Marino

Historical medieval week in cooperation with ministry for culture and tourism is a good practice of cultural tourism development and tourism and culture partnership.

Serbia

- Intersectoral and interdepartmental cooperation projects like "Transormaica", "Ljubljana Process II", "Resava-Mlava" are good practices of cultural tourism development and tourism and culture partnership.
- Other good practices are education of all interested parties in order to raise awareness level about the need and importance of cultural tourism development for the local community and increase of revenues from tourism, sector networking on horizontal and vertical level, the strategy of cultural tourism development, and creation of the Action Plan for the development of cultural tourism.
- The importance of cultural and historical heritage in the promotion of tourism in Serbia is the fact that Serbia is on the four certified cultural routes of the Council of Europe.

Seychelles

Annual cultural events bring the nation together in one setting thereby not only showcasing culture but also promoting multiculturalism.

Sierra Leone

The utilization of the Sierra Leone National Dance Troupe at touristic attractions, organization of Annual National Cultural Festivals, now dubbed: the Sierra Leone Carnival that is aimed at stimulating cultural diversity and motivating Sierra Leoneans at home and the diaspora to enjoy their rich cultural heritage are good practices of cultural tourism development and tourism and culture partnership.

Slovenia

- Main part of tourism in Slovenia is connected with heritage, from urban centres to rural areas with churches and castles and small towns with similar medieval hierarchy. Even the countryside with wooden hayracks is picturesque and used in many promotion materials. Unique is Bled with an island and church on it – it is a symbol of the state, of the alpine region and an icon for tourism. Main important castles are turned to local museums.
- Summer festivals with different performances are very common, even in smaller settlements, developed around a net of different civil societies. People are attached to their local history, local poets and writers; they preserved more than 100 of their homes as small museums. Each year they organize a march from one home to another.
- Similar organizations are more and more popular for all kinds of intangible heritage; Slovenia is a mixture of Mediterranean and Alpine cultures and of different products, food, habits, and languages and hence a special offer of the destination. . People in different regions connect routes or paths of wine, Days of regional products from fruit (Cherries, Kaki fruit, Apple days) to food products (Days of Chocolate in Radovljica and Portorož, Days of salt and olive oil in the coastal towns), to local crafts (shoes in Tržič, wooden products in Ribnica, Laces in Idrija or Železniki) to people in national costumes (Dnevi narodnih noš).
- Several special days are professionally managed and devoted to cultural heritage: Museum night in June, Days of heritage in September and free entrance to the museums on 3 December and 8 February are very popular. Museums are open free for unemployed persons and open to the public at least once each month. A widespread net of museums,- dozen state museums, more than 30 regional and more than 200 local and private – is at the disposal of visitors.

Spain

- The 17 Spanish Autonomous Communities, through its statutes, have assumed the powers of management and promotion of tourism in their respective regions and also in the cultural field on cultural, artistic, monument, archaeological and scientific heritage, museums, and promotion of culture. To do this, the Autonomous Communities have drafted their own legislation on tourism and protection of historical heritage.

As an example, the Autonomous Community of Castile and Leon promotes its advertising campaign as “Castile and Leon: the world’s largest museum is alive” (see: www.turismocastillayleon.com).

Moreover, more than 8,000 municipalities in Spain also play an important role in the tourist and cultural promotion. As an example, the City of Madrid with the promotion of “Art Walk” (see: www.esmadrid.com), where the Prado, Thyssen-Bornemisza and the Reina Sofia are concentrated.

- Online promotion of culture and tourism in Spain also is done by the Ministry of Education, Culture and Sport through the web “Spain’s Culture” (see: www.españacultura.es and www.spainisculture.com).
- Regarding the partnership between tourism and culture in Spain, it is noted that, at the state level, since 2012, the powers of “culture” and “tourism” correspond to two different ministries that have articulated various mechanisms for collaboration and coordination: the Ministry of Industry, Energy and Tourism and the Ministry of Education, Culture and Sports (MECD). Relations between the two, in order to promote international cultural tourism are reflected basically in the protocol between the Ministry of Industry, Energy and Tourism and the Ministry of Education, Culture and Sport for the international dissemination of cultural tourism. The Protocol aims to lay the foundations for cooperation between the Directorate General of Cultural Policy and Industries and [...] Turespaña for the international promotion of the following products: museum bid offer for the performing arts and music, great routes and cultural destinations, World Heritage Sites, manifestations of intangible cultural heritage, Study in Spain, and Plató Spain¹.
- Moreover, as examples of good practice in Spain at the state level can be cited:
 1. Product Club Heritage Cities, which includes the Spanish destinations that have obtained this qualification by UNESCO (see: www.ciudadespatrimonio.org). There is also a *Guide World Heritage Cities of Spain*, co-edited with Turespaña in 2013 (see: www.ciudadespatrimonio.org/mpublicaciones/turismo.php). Professional Dossier 2014 – Group Heritage Cities Humanity of Spain (see: www.ciudadespatrimonio.org/mpublicaciones/turismo.php).
 2. The aforementioned Spain’s Culture Portal which aims to provide a comprehensive service to guide the Spaniards and foreign citizens in the fascinating Spanish Cultural Heritage. Managed by the Ministry of Education, Culture and Sport, this portal Promotion and Dissemination of Cultures of Spain gathers and presents in a website the highlight of the cultural heritage, long history of cultural creation and the current offer of all kinds of cultural products, trying to align it so effectively to citizens (see: www.españacultura.es and www.spainisculture.com).
 3. The official portal of “Brand Spain” also has a very prominent space for the cultural section (see: <http://marcaespana.es/cultura-y-singularidad/turismo/turismo-cultural>).
 4. On the official tourism website about 30 cultural routes are collected (see: www.spain.info). Moreover, within the section “Experiences”, the category of “culture and traditions”, where more than 200 products offered by private companies in relation to the enjoyment of the Spanish culture by tourists are collected. It is a showcase of particular interest to small companies that sign an agreement with SEGITTUR, public entity manager of that site, to market their product.
 5. On the website of MINETUR there is also a section devoted to actions concerning “Enhancement of Cultural Heritage and Natural Enogastronomic” (see: www.minetur.gob.es/turismo/desarrollo-sostenibilidad/patrimonio-cultural/Paginas/patrimonio-cultural-ecogastronomico.aspx).
 6. The Paradores chain “Paradores of Spain, SA” is a tourism policy instrument of Spain, which projects the image of modernity and quality of Spanish tourism abroad and contributes to territorial integration, retrieval and maintenance of historic and artistic heritage of the country and the preservation and enjoyment of natural areas. While

¹ Spain as a destination for the filming of movies, series and ads international spread and for sightseeing to film scenes of our country.

being the principal actor it also supports growth in areas with reduced tourism or economic movement.

The thirty rooms with which Paradores began with the inauguration of the first establishment of the network in the Sierra de Gredos, in 1928, now constitute more than 10,000 rooms and establishments with a total of 94 employing over 3,600 professionals.

7. Renfe a public transport company under the Ministry of Development, has been implementing weekend tourist trains travel or a day's duration, organized and planned to visit and enjoy heritage and nature of unforgettable places. Usual offerings are: Train Teresa of Avila, Cervantes Train, Train Campos de Castilla and Medieval Train (see: www.renfe.com/trenesturisticos/otros-trenes-renfe.html).
 8. Food: the Spanish Academy of Gastronomy was founded as a cultural non-profit association in 1980. Royal Decree 1071/2010, of 20 August, by which it recognizes the Royal Academy of Gastronomy as a public corporation and adopts its statute (see: www.boe.es/buscar/doc.php?id=BOE-A-2010-14624).
- Spain has approved the Law 10/2015, of 26 May, for the Safeguarding of Intangible Cultural Heritage.

Switzerland

Firstly, Switzerland initiated a continuous exchange between tourism policy and culture policy, leading to a better understanding of the interests of each other. Secondly, the exchange lead to a better network between tourism policy and culture policy, which reduced response time in case of need.

Tanzania, United Republic of

Cultural Tourism Enterprise (CTE) whereby communities offer cultural attractions for tourists to participate directly in cultural tourism activities is a good practice of cultural tourism development and tourism and culture partnership.

Timor-Leste

Developing handicraft at local community level, promoting traditional dressing via competitions, establishing historical museum, providing small grand for local communities to rebuild their traditional houses, etc. are good practices of cultural tourism development and tourism and culture partnership.

Togo

- Management Plan of Koutammakou; World Heritage Site of UNESCO is a good practice of cultural tourism development and tourism and culture partnership.
- Project of the Slave Route – Togo: Memory strengthening tourism (National Strategy Document) is a good practice of cultural tourism development and tourism and culture partnership.

Turkey

The Ministry of Culture and Tourism has been implementing a Turkey-Home advertisement campaign relating the Turkey's brand to the country's natural, historical and cultural values. In addition, destination branding has been integrated within Turkey Home campaign based on the fact that throughout the history, Turkey has been the home for many different civilizations.

Ukraine

The development of cultural tourism is one of the main priorities in the marketing plan. The main goal of Tourism & Resorts Department is to increase inbound and domestic cultural tourism in all regions of Ukraine. For the development of domestic cultural tourism it is planned to conduct a large-scale intercity PR campaign aimed to unite all regions of Ukraine, raise public interest in cultural heritage of Ukraine; initiate, promote and support various public events (fairs, festivals, concerts, etc.). To stimulate inbound cultural tourism it is planned to participate in specialized international events abroad, conduct the international PR campaigns aimed to promote the historical heritage and Ukraine as nice and safe country; initiate and support of the various major events (festivals, exhibitions, fairs, sports) at the state level; create bilingual mobile applications that would help tourists with navigation in the city (prompt the location and the distance to the sights, which help to manage with transportation), etc.

Uruguay

Establishment of Inter Action Group for priority areas for the promotion of cultural offerings, which enable tourism experiences, is a good practice of cultural tourism development and tourism and culture partnership.

III.1 Useful documents from Member States

Albania	Albania Culture Marketing Strategy
Austria	“European Cultural Routes“ A Practical Guide
Benin	<i>Politique Nationale Du Tourisme [PNT 2013–2025]</i> National Tourism Policy [PNT 2013–2025]
Bosnia and Herzegovina	Cultural Tourism in Bosnia and Herzegovina
Brazil	– <i>Experiências do Brasil</i> Brazil's experience
Costa Rica	– <i>Plan Nacional de Turismo Sostenible de Costa Rica 2010–2016</i> National Sustainable Tourism Plan 2010–2016 Costa Rica
Croatia	<i>Akcijski Plan Razvoja Kulturnog Turizma</i> Summary of the Action Plan for cultural tourism project
El Salvador	El Salvador Archaeological Route
Kyrgyzstan	– ПОЛОЖЕНИЕ о Департаменте туризма при Министерстве культуры, информации и туризма Кыргызской Республики Regulation on the Tourism Department at the Ministry of Culture, Information and Tourism of the Kyrgyzstan
Madagascar	– <i>Ministere du Tourisme, des Transports et de la Meteorologie Fiche Sectorielle : Tourisme</i> Ministry of Tourism, Transport and Meteorology Sector Sheet: Tourism

Mexico	<ul style="list-style-type: none"> – <i>El Turismo Cultural en México</i> Cultural Tourism in Mexico – <i>Feria de Turismo Cultural México</i> Cultural Tourism Fair Mexico
Montenegro	Montenegro Tourism Development Strategy to 2020
Netherlands	<i>Cultuurtoerisme in Nederland</i> Cultural Tourism in Netherlands
Nicaragua	<ul style="list-style-type: none"> – <i>I Congreso Nacional de Turismo</i> First National Congress on Tourism – <i>Ejes para una Estrategia de Turismo</i> Main themes for the Tourism Strategy – <i>Campaña Promocional “Orgullo de mi País”</i> Promotional Campaign “Pride of my Country” – <i>Identificación de Rutas de Turismo Cultural en la Costa Caribe de Nicaragua</i> Identification of Cultural Tourism Routes in the Caribbean Coast of Nicaragua
Panama	<ul style="list-style-type: none"> – <i>Autoridad de Turismo Dirección de Mercadeo</i> Panama Tourism Authority, Department of Marketing – <i>El Patronato</i> The Patronato/Patronato Panamá Viejo
Poland	Tourism Development Programme until 2020
Romania	<ul style="list-style-type: none"> – Annual Tourism Reporting to European Commission – Project: Strategic and Operational Marketing Plan for Romania 2011–2015
Serbia	Tourism Strategy of the Republic of Serbia
Slovenia	2012–2016 Slovenian Tourism Development Strategy
Spain	<ul style="list-style-type: none"> – <i>Plan Nacional e Integral de Turismo</i> National and Comprehensive Plan of Tourism – <i>2015 Anuario de Estadísticas Culturales</i> 2015 Yearbook of Cultural Statistics – <i>Ley 10/2015, de 26 de mayo, para la salvaguardia del Patrimonio Cultural Inmaterial</i> Law 10/2015, of 26 May, for the Safeguarding of Intangible Cultural Heritage
Switzerland	Summary of the growth strategy for Switzerland as a tourism destination
Tanzania, United Republic of	National Tourism Policy
Zambia	Tourism Policy for Zambia

List of acronyms and abbreviations

AADF	Albanian-American Development Fund
ALECTOR	Collaborative Networks of Multilevel Actors to advance quality standards for heritage tourism at Cross Border Level
ATLAS	Association for Tourism and Leisure Research and Education
CCA	Cluster Competitiveness Activity
CNY	Chinese yuan
CoE	Council of Europe
CTE	Cultural Tourism Enterprise [in the United Republic of Tanzania]
DINKS	double income no kids
DNA	deoxyribonucleic acid
ECOC	European Capital of Culture
ETC	European Travel Commission
EU	European Union
EUR	euro
FRONTUR	La encuesta de movimientos turísticos en fronteras
FTCMEX	Feria de Turismo Cultural México
GBP	British pound
GHATOF	Ghana Tourism Federation
ICT	information and communications technology
IFACCA	International Federation of Arts Councils and Culture Agencies
KTO	Korea Tourism Organization
MCA	Multiple Correspondence Analysis
MECD	Ministerio de Educación, Cultura y Deporte (Ministry of Education, Culture and Sports)
MFDP	Ministry of Development Planning of Liberia
MTA	Malta Tourism Authority
NGO	non-governmental organization
NTA	national tourism agency
OECD	Organisation for Economic Co-operation and Development
OIC	Organisation of Islamic Conference
PNGTPA	Papua New Guinea Tourism Promotion Authority
PPP	public-private partnerships
PR	public relations
SAPNG	Surfers Association of Papua New Guinea
SECTUR	Secretaría de Turismo de México

SEGITTUR	Sociedad Estatal para la Gestión de la Innovación y las Tecnologías Turísticas, S.A.
SINKS	single income no kids
SME	small and medium-sized enterprises
UHPA	Association of Croatian Travel Agencies
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	World Tourism Organization
WYSE	World Youth Student and Educational Travel Confederation

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