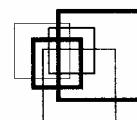


*Culture: A Driving Force for Urban
Tourism - Application of Experiences
to Countries in Transition*

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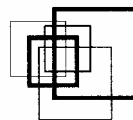
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Foreword

This collection of papers represents the main issues discussed at the seminar **Culture: A Driving Force for Urban Tourism – Application of Experiences to the Countries in Transition**. The seminar was held at the Grand Hotel Park in Dubrovnik, Croatia, from 18 to 19 May 2001 through the organization of the Culturelink Network/IMO and the Institute for the Restoration of Dubrovnik. The seminar brought together some sixty-five participants from Austria, Belgium, Croatia, Italy, the Netherlands, Slovenia, the United Kingdom and the United States.

Its main aim was to present research papers together with best practice examples in order to enable local tourism and culture practitioners to learn from it how to manage their cities culturally for tourists and, at the same time, to improve the quality of life of the citizens themselves.

The first day of the seminar discussed two main topics: 'Cultural Tourism as a Niche Market' and 'The City as a Resource in Tourism' while the second day presented the round table on the topic of 'Croatian challenges and prospects for cultural tourism development in Croatia'.

The first session concentrated on cultural tourism as a great potential market: visitors who look for cultural experiences stay longer, spend more money, have higher education levels and have higher household incomes than the visitors who belong to the mass tourism market. The following issues were presented: Opportunities for a local community/city/region/country in developing cultural tourism as a priority market; Cultural supply and cultural demand in tourism; Benefits/threats for a cultural tourism market; Importance of cultural tourism for the whole cultural/tourist sector as well as for the economic sector; Examples of good practice.

In order to manage quality tourism in cities, it is necessary to start with the statement that 'in cities, the marriage of culture and tourism guarantees success'. The papers of the second session were based on this statement. Accordingly, the following themes were to be discussed: Culture as a basic resource for urban tourism; Tangible and intangible heritage as equal attractions; Urban tourism as a factor of decentralization of cultural/tourist activities; Diversity as a key element in urban tourism supply, should cities be partners or rivals?; Examples of good practice.

The round table offered the opportunity for all participants to present their views and suggest solutions for the development of sustainable cultural tourism in Croatia. The discussion comprised issues related to the private and public sector, legal support, education, enhancement of the tourist offer, extension of the tourist season and geographical base, etc. but was mostly concentrated on the burning issues of funding problems as well as the lack of coordination between cultural and tourist sectors in Croatia. The session examined the ways in which the development of cultural tourism in Croatia can contribute to the overall cultural/tourist sector as well as to the economic sector.

The proceedings comprise fifteen papers and present richness in ideas and thought from top European researchers in this field. How theatre, music, textile or culinary heritage can contribute to the development of urban tourism; how to effectively communicate with museum

visitors; what is the strategy of Croatian cultural tourism development and what are its strengths and obstacles; how to develop cultural tourism at mass tourism destinations - all this was discussed and is represented by these proceedings. It is hoped that the issues discussed, the results provided, the connections and friendships gained at the seminar will contribute to the aims of the seminar as well as to the development of science in this field.

On behalf of all the participants, the project coordinator/the editor of this volume would like to thank the Open Society Institute, Croatia, which gave the greatest support to the project. Also, our thanks go to the Croatian Ministry of Science and Technology, Croatian Ministry of Tourism and Croatian Ministry of Culture, which provided their support to the seminar. The Croatian National Tourist Board and Croatia Airlines deserve to be mentioned for their great support either in services' subsidies or in material goods. The partner institution, the Institute for the Restoration of Dubrovnik is thanked for their logistic and financial support. Its director, Mr. Vjekoslav Vierda is especially thanked for his engagement during the city tour when he practically showed how to transfer research results into practice in an innovative way.

Our special thanks go to the Friedrich Ebert Stiftung and once again to the Croatian Ministry of Culture as well as to the Croatian National Tourist Board, which made possible the publication of the proceedings.

Croatian Cultural Tourism Development Strategy

Daniela Angelina Jelinčić

Introduction

In Spring 2000, the Croatian Government expressed the need for a Croatian Development Strategy in the 21st century and, therefore assigned the independent teams of experts with the task of writing the drafts for this project divided into various sections. Thus, the Institute for International Relations was assigned the task of creating the Croatian Development Strategy for the cultural sector. The independent experts team developed the draft to be discussed with professionals in the related fields of theatre, museums, film, visual arts, etc..

This project relied on the former project 'Cultural Policy in Croatia: National Report' which was carried out in 1999, also by the team of independent experts, within the Council of Europe's 'National Cultural Policy Reviews' programme. Cultural policy did not include 'cultural tourism' as an independent part of the policy, it only mentioned it, while the report of a European group of experts, led by Charles Landry, recognized culture as the key selling point for tourism development. Usually, culture is the primary reason a visitor comes to an area, especially if culture is broadly defined. This was the starting point for the creation of the Croatian Cultural Tourism Development Strategy, the text written by myself and used as a draft for discussion and creation of a greater and more detailed cultural tourism development strategy.

The presentation of the whole project was done in March this year and great interest for the subject of cultural tourism has been shown. It was concluded that cultural tourism has been presented in too timid a way and should be approached more aggressively. It has been a European cultural-tourist prime subject for the last decade and a half and Croatia has just come to be recognized as an excellent tourism niche market. Although many tourist programmes included culture as part of the tourist package, it has not been enough, especially as most of these cultural programmes have been imported, not using **Croatian cultural distinctiveness** as a tourist resource.

Therefore, the proposed cultural tourism development strategy proposed seeks to use the cultural resources of Croatia as its key selling point. Going beyond merely visiting heritage sites, churches and museums, although these are important, it seeks to celebrate every aspect of Croatian culture - food, wine, the landscape, activities and even the language. It seeks to involve the tourist with locals and make every tourist a cultural explorer and discoverer (Landry 1999 : 37).

The **local community should be ready** for the decision on the possibility of the development of tourism in its surroundings. Also, it should be left to decide if it wants to develop tourism at all, although in Croatia, this kind of decision is not likely to be made because Croatia already has the tradition of tourism. A community does not live if its population cannot be identified with it. The local community should be proud of its village/town/city because successful tourism cannot be developed against the will of the local community. This principle should be the basis for every tourism planning.

Main Aims of the Cultural Tourism Development Strategy

As mentioned before, the principles underlying the development policy should be **to use local resources** wherever possible and **to be distinctively Croatian**. The objectives apart from increasing visitors are to:

- extend the season;
- extend the geographical base beyond the beach and into the hinterlands;
- guarantee sustainability;
- encourage micro-business development and economic prosperity (Landry 1998 : 37).

Extending the Season and Extending the Geographical Base

So far, Croatia has been selling only sea and sun, basing tourism on one sphere such as coastal tourism. It is the particular cultural offer that may stimulate the development of tourism in other seasons than summer. This is how we would like to stimulate the other forms of tourism development, especially urban tourism aimed at continental cities or cities in the hinterlands. Cities located along the coast have normally developed greater tourism but due to the fact that they use their coastal position as the primary benefit in tourism and only use culture and other facilities as a secondary tourist resource. Of course, in this case too, culture may be a means of extending the season, but we would also like inland cities to develop their own cultural tourism programmes.

To this end, one of the proposals may be the creation of the currently popular cultural routes, considering that Croatia historically belongs to the Austro-Hungarian cultural background, which may be used as a common resource.

Also, other tourist resources may be used such as sports, religion or places of natural beauty to form coordinated tourist programmes. Therefore, mountains and hiking, speleology, flora and fauna may be used as a resource all in cooperation with the local lifestyle including architecture, gastronomy and entertainment.

The low season offer could be related to various religious events in which the Catholic calendar is so rich. What is interesting and partly wrong in Croatia is the inversion of calendar events: carnival, instead of being offered to tourists in winter where it normally belongs, has been moved instead to summer as part of the mass tourism offer.

Croatian ethnography and ethno-destinations may also be used in any part of the year, especially if relating to educational tourism. It can also be applied to castles, which are extremely numerous in continental Croatia as well as to archeological sites, churches, monuments, museums and galleries for which a season is not necessarily specified.

Guarantee of Sustainability and Encouraging Micro-Business Development

A guarantee of sustainable tourism development is closely connected to the stimulation of micro-business development. If a local community is able to integrate their everyday businesses and professions into the tourist activity and thus present their local lifestyle, it is likely that the quality of tourist visit, as well as the quality of local population life will be ensured. Today, fisheries and agriculture, for example, have already been used for the tourism sector, which is partly the guarantee of sustainability for the local community. Additionally, the development of traditional crafts, art galleries, restaurants offering local food and beverages should be stimulated. It is very important that the owners of such businesses should come from the local population.

With such an approach, a number of criteria for development become apparent: small scale initiatives rather than grand scale gestures and mega-projects; the establishment of comprehensive programmes such as a bed and breakfast strategy, where the role of agencies is to create something like a marketing consortia; joint signage or other branding devices or the training of locals in local distinctiveness issues (Landry 1999: 38).

Decentralization and Coordination of Cultural and Tourist Sectors

Another important issue in the Croatian Cultural Tourism Development Strategy is the issue of decentralization of Croatian culture and tourism. The European cultural decentralization tendency should be present in Croatian culture, too. If so, cultural tourism would enable local government as well as the local cultural institutions and organizations to develop their self-management, because of income increased by cultural tourism. If the Croatian development strategy includes the development of cultural tourism, we can expect an increase in cultural demand within the culturally directed tourist visit. In this way, local government would be given greater power and a chance to create local strategies since they are familiar with the locality itself. As a consequence, there would be a richer, more inventive and more diverse cultural production and supply (Dragojević 1999 : 79).

The issue of sectoral coordination seems obvious and a *conditio sine qua non* but so far it has not been present in Croatia almost at all. A successful strategy cannot be created within the framework of one sector, for example tourism or culture, separately. In addition, it is very difficult to plan taking just these two sectors into account. The key word here is **multidisciplinarity**. Tourist planning should be executed within the framework of coordinated sectors such as the economy, finance, education, health, science, technology, micro-business, sport, religion, ecology, urban planning, industry, transportation, agriculture, fisheries, culture.

Also an intersectoral approach within the framework of culture itself should be considered. If tourist programmes are coordinated between various cultural institutions and events at the destination, such as between museums, galleries, libraries, theatres, cinemas, etc.

it will not be difficult to create a common package to be supplied for the tourist to get to know the cultural life of a community.

Cultural and tourist employees should be more aware of the need for coordination and be stimulated to create common projects. This development strategy draft could be a starting point for the discussion and an introduction to the debate with the aim of making the practitioners' work easier and clearer.

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Landry, Charles (1999). *From Barriers to Bridges: Reimagining Croatian Cultural Policy. Report of a European Group of Experts*. Zagreb, Council for Cultural Co-operation, Council of Europe/Ministry of Culture of the Republic of Croatia/Institute for International Relations, 60 pp.

Croatian Tourism: Consuming Culture, Affirming Identity

Renata Fox

Introduction

At the beginning of the third millennium, tourism has become a leading form of human contact, the largest employer, and possibly the largest industry worldwide. By the year 2010 tourist arrivals are predicted to reach one billion, and revenue is expected to amount to some US\$ 2.5 billion (AlSayyad 2001 : 1). In the year 2050 international arrivals will amount to 2 billion tourists per year, and international receipts will reach 2.1 trillion US\$ (expressed in 1999 dollars) per year (Pizam 1999). Just as the number of tourists is increasing dramatically, so, too, is tourist destination competition - the result being an ever-greater consumer demand for unique cultural experience.

In this sense the timing of the conference *Culture: A Driving Force for Urban Tourism: Application of Experiences to Countries in Transition* is perfect and its agenda - a highly interdisciplinary one, related to a number of fields of academic enquiry: culture and tourism, urban tourism, tourism and transition - extremely relevant.

To qualify for full participation in the process of cross-cultural consumption - a social and cultural practice involving mobility of people and interfacing of various cultures - Croatian tourism will have to establish a link with Croatian culture, aim to maximize the cultural aspect of the Croatian tourism product, and, consequently, re-define tourist experiences. This will involve seriously addressing the role of culture (traditional or/and manufactured) in Croatian tourism while at the same time dealing with the changing nature of the tourist industry itself.

Destination image is constructed/reconstructed through physical transformation - development programmes, preservation works, programmes of beautification, most obvious perhaps in a tourist megalopolis such as New York, Paris, Vienna. Chiefly (but not only) for economic reasons, cities have turned to marketing, image creating, re-creating, and selling. Tourism, one of the most 'concrete forms of globalization', has played a key role in this 'urban image-construction process' (Broudehoux 2001: 274). Cities are becoming the most important type of tourist destination, their attraction potential and their participation in the ever-growing tourist competition is expected to expand (see, for example, Law (ed), 1996; Tyler, Guerrier and Robertson (eds), 1999; also Global Tourism Forecasts,... 1991:xi; Tourism 2020, ... 1997). The true nature of the city/tourism relationship has been aptly grasped by Ashworth (1992) in his claim that a city developing urban tourism is either shaping tourism or being shaped by it. Urban tourism, a complex phenomenon, both in terms of describing and interpreting (Law 1996

: 19), was, as a field of academic enquiry, addressed only in recent years. The debate has now, however, definitively moved 'beyond the descriptive towards a more conceptual understanding of processes involved in the development and management of tourism in cities' (Tyler and Guerrier 1998 : 229).

In line with this, and bearing in mind the economic and wider social benefits brought by tourism - employment, foreign exchange earnings and general quality of life - Croatian urban authorities will have to urgently start re-tailoring their cities towards image- and identity-boosting. But, above all, they will have to redefine both their understanding of tourism processes in urban areas, and the nature, development and management of the city tourism product.

Although the unravelling of a centralized state planning system in former communist countries was visible already in the 1960s, the transition with the ultimate aim to create market economies started, depending on the country, between 1989 and 1990. Various aspects of transition - for example, processes of privatization, management, financial services - have been given much research attention (see, for example, Culpan and Kumar 1995). The interaction tourism/transition seems to be an under-researched area: academic enquiry into tourism of the former communist countries has been both 'slow to develop and inconsistent in its coverage' (Light and Dumbrăveanu, 1999 : 899). This is quite surprising, considering that tourism was often a model for reform, especially liberalization for the international trade (Williams and Baláz 2000 : ix-x).

Having outlined the three cornerstones of this conference, the attention should now be turned to culture in Croatian tourism, which is discussed under three headings: Croatian tourism - celebration of culture, Croatian culture and transition, and discourse of Croatian tourism.

Croatian Tourism - Celebration of Culture

Throughout the centuries Croatia has been on the crossroads of different cultures, religions and ways of life, manifested in its 'cosmopolitan richness', most obviously visible in architecture, traditions, events and, not the least, language. This is a significant tourism potential. Reflecting on the theme *Tourism is Culture*, a European panel of examiners' provisional report *Cultural Policy in Croatia* recommended that (1) the rich and diverse cultural resources of Croatia could and should be used as its key selling point; (2) incorporating Croatian culture in tourism could and should go beyond merely visiting heritage sites, churches and museums, although these are important. Rather, the cultural tourism strategy of Croatia should seek to 'celebrate every aspect of Croatia's culture - food, wine, the landscape, activities and even the language' (Landry 1998 : 41).

How much of this has been put into practice? In the past Croatia has generally put emphasis on mass tourism without identity, with marketing focused on natural beauties, sea and climate. Only a few coastal destinations (notably Dubrovnik, Zadar) have built their offer around culture, tradition and heritage. Cultural tourism¹ in Croatia has been chronically

¹ The concept of *cultural tourism* is used here in a very wide sense. It includes *heritage tourism* (visits to historical sights, museums, galleries...), *ethnic tourism* (experience of a distinctive lifestyle...) and *popular culture* (pop concerts, folk music, live entertainment...).

neglected (especially in the continental part). There has been no integration of cultural and tourist policies. Finally, there has been very little (hardly any) commodification of culture - Croatian traditions, rituals, ways of life have not been packaged, imaged and transformed into products (see Cvjetičanin and Katunarić (eds) 1998 : 79-81).

Inclusion of culture into Croatian tourism will have to be based on what Landry (1998 : 41) named 'a local distinctiveness movement', valuing anything that is unique in a place: an endemic plant, food, a monument, an olive mill, an event, or simply lifestyle. The inclusion will also be subject to one condition: portrayability as a tourist product.

The essence of creating a successful (tourism) brand, especially in the case of spiritual heritage, is to build an emotional link between the product and consumer (Pritchard and Morgan 1998). The emotional link must be: (1) compelling; and (2) drive all the design elements (Pine and Gilmore 1998). How this can be done I shall briefly demonstrate through an outline of a project *Mapping the voyages of sixteenth and seventeenth century British travellers along Croatia's coast*, developed by a group of researchers (pilot project outline in Fox and Fox 1998).

Hypothesis

The fundamental assumption of this project is that British sixteenth and seventeenth century seaward travellers' descriptions of Croatia's coast and islands, its people and their ways of life are a valuable cultural heritage document.

Project background

At the end of the sixteenth century the British began to travel abroad to the Levant. A popular route taken was the voyage from Venice to Dubrovnik. Many of these travellers wrote about their experiences and lands they visited. These travelogues contain a large body of anthropogenic descriptions about Croatia's coastal towns and islands. They offer a unique perspective from which Croatia's cultural heritage is described (Fox and Fox 1998).

Project aim

Croatia's cultural heritage as described by sixteenth and seventeenth century British travelogues is *virtual*: it has content (can be read about), but lacks form. The main goal of this project is to establish the form within which it will materialize and allow its eventual application in tourism as an emotional theme for nautical tourism.

Merits of the project

- manifesting the importance of Croatia's spiritual heritage;
- widening the understanding of the Croatian national contribution to the common and indivisible European cultural heritage for which each European state is responsible;

- helping Croatia's tourism to 'create a cultural market in Croatia and abroad';
- enabling the progression of Croatian cultural heritage economic value;
- encouraging the return of British tourists to Croatia;
- encouraging Croatian-British cultural links;
- from an academic perspective, contribution to different scientific areas, notably, literature, culture, anthropology, tourism and sociology.

Research methodology

Cultural mapping, i.e. using spatial concepts in cultural analysis. Two key concepts are important here: *cultural networks* - an entire structure or fabric consisting of interrelated places (cities, centres, attractions, islands) through a functional system of movement and travel (circuits), and *cultural circuits* - closely related to the different voyages of the British travellers, along which an entire and integrated image and product of the cultural landscape was perceived, appreciated and 'consumed'.

Travelogues are analyzed within a broad two-dimensional character of cultural heritage: historical-evolutionary and human-social-cultural. The characteristic underlying both dimensions is the geographic-territorial identity; the whole range of a place's physical and man-made features, where the entire stock of cultural output is related with or inscribed upon.

This example - and there are definitely many more - clearly demonstrates that Croatian cultural heritage can easily be used to strengthen Croatian identity, to re-image the country as a whole, its regions and individual resorts, to support intercultural understanding and, last but not least, to generate income.

The key issue of merging Croatian culture and tourism will be the ability of Croatian culture (and numerous local subcultures within that formation) to decide what aspects of their cultural heritage to display. The task is not an easy one: a great majority of Croatian destination brochures show an essential lack of understanding of importance of destination symbols (selection, creation ...) which in the consumers' mind are quite spontaneously relatable to the destination (Fox and Fox 1998; Fox 1999).

The framework of this development is defined in the Croatian Tourism Development Strategy (1993), the Main Tourist Industry Plan of Croatia (1993), the Croatian National Tourist Office and Tourism Promotion Act (1994), and strategic tourism marketing plans for individual counties.

Two documents are essential for integration of Croatian culture into tourism:

- National review of Croatian cultural policy, prepared between autumn 1996 and autumn 1997, and presented to the Council of Europe on 8 April 1998;
- Culture in Croatia: From Barriers to Bridges - Re-imagining Croatian Cultural Policy (a strategic response to the National review of Croatian cultural policy), published by the Council of Europe Council for Cultural Co-operation, Strasbourg, 2 April 1998.

The common theme of all the listed documents is the imperative of Croatian tourism to become a carrier of cultural messages and a medium of culture consumption. In this process Croatian culture will, depending on the theoretical perspective, be assigned different roles: it will be seen as a key to authenticity, an element of differentiation, a series of images to be consumed or possibly an invention which is, to quote Allcock (1995), simply suggesting preference of one symbolic universe over another.

Croatian culture and transition

As in other former Communist states, cultural transition in Croatia takes place on three levels: (1) organizational - manifested in the creation of new organizational forms with more individual initiative, freedom and market orientation; (2) value-related - seen in increased importance of individualism vs. revival of collectivism (typically nationalism, as a replacement for Communism), and symbolic - typified by use of historical and cultural heritage as decoration for new political elites (Cvjetičanin and Katunarić (eds) 1998 : 250-251). The process of transition so far has not had the strength to shift Croatian culture from the margins into the centre of social life - one of the gravest consequences being the constant invalidating of culture, not just arts and heritage, but science, research and education, too. Croatian cultural capital is being continuously reduced and the gap between Croatia and developed countries widening. A decisive improvement is expected when the two cultural spheres (state and non-state) start interfacing (ibid. 270). The present obstacles to this are not of a legal and financial nature, but mainly ideological and psychological. The union of two sectors is expected to lead to the new understanding of culture as a value potential which is not to be reduced to just political, economic and social merits. All prejudice will have to be eliminated and creativeness increased.

The success of Croatian (cultural) tourism remains, however, subject to broader political and economic developments. So far Croatia's transition has been rather chancy, privatization processes controversial, and privatization goals often highly questionable (Čengić 2000). Transition seems to be taking place in what Dye (1986) has described as an allocational arena - defined more by personal interests than economic resources, which is causing the failure of collaborative processes (Fox and Fox 2001: 43). According to leading Croatian experts in tourism (see, for example, Jakuš 1999 : 4-6), Croatian hotel management is often outwardly supportive of the idea of privatization and foreign investment, but in reality hoping to retain the status quo, which they see as the only way to retain their positions and privileges. Obviously, a sharp turn needs to be made. An imperative in this process is a radical transformation of what Croatian tourism offers - in short, replacement of 'sun, sand, sea' by 'entertainment, excitement, education', with an emphasis on culture, cultural information, tradition, sites and monuments (see Vierda 1995; Fox 1997; Fox and Fox 2000). For this firm support has been given by all governmental bodies (Turizam je ...2000 : 4; Naše su šanse ... 2000:5). Within the context of transition, which is marking the start of Croatian culture commodification - packaging, imaging and transforming traditions, rituals and ways of life into products - processes of tourism/culture interaction in Croatia should be open to comment in at least three areas:

- tourism and globalization;
- financial and social benefits for Croatia;
- educational and academic aspects.

Tourism and globalization

The difference between global and local is not of scale but of kind. To perceive the environment as global is to 'collude in a privileging of the global ontology of detachment over the local ontology of engagement - it is to celebrate technology, intervention, expert management and the relative disempowerment of the local people' (Urry 2000 : 46). Population of the countries of the European Union, for example, feels increasingly 'European'. If a European public sphere is developed, this might result in a European civil society (Habermas 1998; Urry 2000 : 156). Apart from knowledge and discourse, both primarily meant as instruments of social emancipation, it is travelling and tourism (Stevenson 1997) that will decidedly contribute to and profit from these processes.

The relationship between globalization and identities is full of contradictions. Cultural tourism is a key economic factor in a nation's development, which enables a nation, a region, a resort to position itself globally. On the other hand, globalization is often viewed as a danger for ethnic and cultural identity and a challenge to its historicity (Robins 1997). There is, furthermore, a danger that investment in heritage may lead to invocations of superiority and isolationism (AlSayyad 2001 : 16). Globalization, according to Robins (1997:33), seems to be both about cultural 'de-territorialization' and 're-territorialization', 'about the increasing mobility of culture, but also about new cultural fixities'.

Consequently, the relationship culture/tourism is an ambivalent one: on the one hand tourism tends to encourage globalization and cultural hegemony, on the other hand the success of tourism is directly based on diversity and cultural differences (AlSayyad 2001 : 54). The paradox, again, is only apparent. The more homogenous the world is becoming, the greater the desire in all communities to reinvent the values which delineate culture (Naisbitt 1995). One of the mega trends of tourism is after all: think globally, act locally. In other words, globalization will, by encouraging cultural hegemony, in effect be continually increasing cultural awareness.

These fears of globalizations - most commonly expressed by small communities (and Croatia is not an exception) - clearly show that those subject to these processes are not aware of either their liabilities or entitlements to:

- full cultural participation within world society (in terms of information, knowledge and communication);
- care about their (Croatian) culture and encountering hybrid cultures containing elements of their culture;
- migration for leisure purposes to most countries on the planet and to be a consumer in those other places (Urry 2000 : 174).

The chief responsibility of participating in the process of globalization is cosmopolitanism towards other environments, cultures and peoples, with the entitlement to consume or to refuse to consume (ibid. 175). It is, as we see, globalization that gives all cultures the unique opportunity for enrichment through contacts with other cultures. This, of course, means that culture can no longer be viewed as autonomous, internally coherent and universe, and that there is not much point in protecting one's culture from the influence of other cultures.

Benefits for Croatia

Financial benefits

As with any other developing economy, Croatia sees in tourism a rapid and elegant way to generate income, procure foreign exchange and create employment. This is explicitly stated in documents of Croatia's tourist development. As stressed by Croatia's prime minister, Iвица Račan, in tourism lies the economic future of the country, assuming, of course, that privatization has been successful, governmental assistance optimal and tourism's transformation in line with new mega-trends (Turizam je naše ... 2000 : 4).

Presently, Croatia's financial gain from the cultural offer in tourism is marginal (see Stavovi i potrošnja ... 1997): 82 per cent of tourists' total expenditure goes on accommodation, food and beverages, while 8 per cent is spent on shopping, 8 per cent on culture and entertainment, and 2 per cent on other (ibid. 42). Just for illustration: in London almost 50 per cent of museum attendance is made up of tourists (Urry 1997 : 118). Prague, traditionally the most esteemed tourist destination of central Europe, attracting relatively high-income tourists from the EU and the USA, generates an estimated 70-80 per cent of Czech international tourism receipts (Williams and Baláz 2000 : 170).

Croatia's low revenues from the cultural side of tourism are a plausible result of an inferior range/quality of supply, confirmed by tourists' motives and degree of satisfaction. Cultural sights, for example, represent a motive for visiting Croatia in 7.6 per cent of tourists (Stavovi i potrošnja ... 1997 : 23). Among activities in the destination, sightseeing represents 32.7 per cent, attending local events 19.2 per cent, visits to museums and exhibitions 11.5 per cent, attending concerts 7.9 per cent, and theatre performances and shows 2.8 per cent (ibid. 34). The quality of sights signage, choice of entertainment and variety of cultural events are all evaluated as very low (ibid. 40).

The latest developments in Croatia's tourist destinations (most clearly manifested in new and improved promotional materials, e.g. Vodič Lovrana, Povijest Lovrana ...) show an awareness of tourists' need for an increased exposure to local society and its culture. Cultural and ethnic resources are now definitely seen as a way to stimulate the economy. After all, any product, including a cultural one, has its price, and all those lovely 'moneyed tourists' (Greenwood 1989) have a right to see whatever they wish, providing they pay. Not wishing to run the danger of sounding too optimistic, one can quite safely state that revenue from cultural tourism is almost guaranteed: a 'new' tourist, seeking primarily cultural encounters, is willing to buy all cultural experiences that are available.

Social benefits

Cultural tourism is expected to become a significant factor in the remaking and reinventing of Croatian culture through an image- and meaning-construction process, affecting the destination's (country's, region's, resort's) material and symbolic capital, as well as its self-perception (Broudehoux 2001 : 274-275). The Lake District, a good example of image- and meaning-construction, is an excellent demonstration of the power of visual discourse. A process of transformation that started in the Lake District some 150 years ago was not so much material, but mainly involved a 'new way of viewing nature' (Crawshaw and Urry 1997 : 185), which enabled the cultural construction of the imagery of the Lake District.

Tourists visiting Croatia (or any other country) who gaze upon its identity are at the same time re-discovering their own identity (Urry 1997). Croatian tourism thus functions as a perpetrator of integrating Croatia in global processes, from which, ultimately, the whole country will benefit.

Furthermore, the development of cultural tourism is expected to contribute to decentralization of Croatian culture at national level. Increased cultural demand, created by tourists, will eventually lead to financial and organizational independence of cultural institutions (Cvjetičanin and Katunarić (eds) 1998 : 79) .

Finally, in an increasingly competitive world, intensive development of tourism - especially cultural tourism - is a way for Croatia to achieve wider social and political prestige.

Education and research

The reification of (cultural) tourism in developed countries is being supported by theming as an emerging force in tourism education. Some institutions offer themed degree roots (e.g. rural tourism, adventure tourism management, sports tourism ...) which equip graduates with specialist skills. There is a growing need for specialization in tourism education. If tourism education is to meet the needs of an increasingly diversified industry, it is expected that various domains will emerge within it (Dale and Robinson 2001 : 32):

- a) generic degrees - leading to global understanding of the tourism industry;
- b) functional degrees - offering expertise in a particular area (marketing, planning);
- c) market/product-based degrees - focused on particular niches.

In practical terms, this means that Croatian universities, too, will have to offer specific products (curricula/graduates) to global consumers (students/employers). As the University of Rijeka and Manchester Metropolitan University joint project *Hotel and Tourism Management Education Development* has confirmed, the countries wanting to keep up the pace in tourism and hospitality will have to develop a more competitive higher education system which aims to generate change, raise standards, build a new learning culture and cooperate more intensively with industry (see also Honey and Botterill 1999 : 12). In Croatian tertiary education for hospitality this will generally involve:

- redefining educational/training programmes at all levels through feedback from (transformed) hospitality industry;
- improving management education/training;
- implementing international professional standards (cf. Fox 1998).

Specifically, university curricula will have to become more learner-oriented - in design, content and organization - so as to:

- increase flexibility and student choice;
- stage and regulate student progression and achievement;
- exactly define student workloads;
- provide academic guidance and supervision;

- provide an external examiner system;
- establish small expert teams to provide benchmark information on standards;
- introduce independent and public reporting of quality (meaning the replacement of the rather *bona fide* arrangement between the Croatian Ministry of Science and Technology and faculties, with exactly defined rules, requirements and criteria: a set of obligations and rights to be respected by both sides).

Innovation in any activity, and education too, is 'as much about ideals as it is about ideas' (Nonaka 1999 : 25). It is ideals built into the vision that promote innovations. There is no end to what a university could undertake. It can even participate in the tourism industry itself (cf. Roppolo 1998 : 197), by organizing summer-courses, offering accommodation either on the faculty campus or in nearby hotels.

Countries in transition might be tempted to use circumstances of transformation as a pretext for weaker educational standards and reduced criteria with respect to staff and/or students. This 'transitional trap' (Fox 1998a) should be carefully avoided. There are, admittedly, great 'conceptual and contextual' differences between Croatia and developed countries (Kivela 1997 : 117-118). If appropriately handled, they should, however, affect the education transformation processes positively, and enable new curricula to develop within the frame of national educational tradition, specific cultural values and identities.

Discourse of tourism

Tourism is a complex communicational system: for tourism/tourists, by tourism/tourists and about tourism/tourists (for a comprehensive socio-linguistic treatment of tourism see Dann 1996). All verbal representations of tourism are included in the discourse of tourism, which is specific, not just in terms of a set of communicational purposes, but also in terms of the linguistic properties that it uses. It has a defined semantic content, uses symbols, and includes registers and sub-registers.

Discourse of tourism is, in fact, a global framework for all signs and symbols which are, in the eye of the consumer, relatable to the destination (country/region/resort). A great, and probably the most essential, portion of discourse of tourism constitutes a discourse of publicity. This is typical for the entire postmodern economy, marking a major shift from production to consumption. The genre of consumer advertizing has colonized professional and public service orders of discourse on a massive scale, meaning that discursive practices are being largely instrumentalized (Fairclough 1999).

Discourse of tourism, specifically, discourse of tourist promotion, not only enables construction of destination, it is also the first step in its consumption which starts at a great spatial and temporal distance from a destination, and can be controlled solely through discourse. Only through an appropriate use of discourse - selection of an appropriate reference frame, (sub) register, lexical items ... - can a tourist be invited to participate in the process of education, excitement and entertainment. It is primarily for this reason that the discourse of tourism needs to be constantly monitored, researched and developed.

Discourse of tourism is generated by members of the tourism community (consumers, practitioners, educators and scientists), constituting a tourism discourse community. They agree

on a set of common goals: forms of participation in tourism (selling and buying, teaching/training, research). This participation enables and is, in turn, enabled through intercommunication and information exchange. In other words, a set of common goals is realized through a set of communicative purposes.

In communication- and language-related research on Croatian tourism, syntagm 'language in tourism' has traditionally been used to mean 'foreign language in tourism'. The potential of the language of tourism as a holistic category, a system of universal symbols, a factor of new reality, a medium of social identification of message sender/receiver, and an instrument of social control has not been explored yet (Fox 1998b). A research into Croatian destination brochures (Fox and Fox 1998) points towards their low cultural informativeness, highlighting a discourse which is far from optimal. The issue needs to be seriously addressed for both general and particular reasons. Generally, as tourism is becoming a key medium of human contact, the importance of communication and discursive competence in tourism will grow. In particular, each time a tourist destination fails to use the appropriate form of discourse of tourism - the strongest instrument for selling goods, ideas and services - it misses the chance to publicly identify itself, and to position itself in the multidimensional network of the global discourse community of tourism.

But this is not all. Although culture is defined as a way of life - material and non-material heritage - transmitted from one generation to another, what is really transmitted is knowledge and rights over material and non-material things (Graburn 2001 : 69). From that point of view Croatian (or any other) discourse of tourism is not just a medium, but in itself represents a process of cross-cultural consumption. An appropriate use of discourse of tourism - which is typically promotional in nature, has a chance of entering other orders of discourse, and is instrumental to the most attractive of all consumption processes - will enable the destination to assume control over the consumer and to exert power to induce/increase consumption.

Conclusion

Croatia's 'untapped' tourism potential is on the demand side marked by steadily increasing international arrivals, and on the supply side by poor infrastructure, questionable quality of accommodation which is in need of investment (not to mention the need for expertise, appropriate training, and general understanding of the market economy in tourist management). Awareness of economic and employment potential of the use of cultural heritage for tourism purposes contributes to a more productive/positive perception of cultural tourism in Croatia. In relation to the marriage between cultural heritage and tourism, two complementary processes seem to have started: the shaping of Croatian culture for tourism and the shaping of Croatian tourism for culture.

One is fully aware of the many obstacles of this option. While cultural tourism is often and somewhat simplistically seen as otherness exchanged for money, the process is rather more complex, often lacking harmony and mutual cultural understanding (Robins 1991; Craik 1994). Tourism itself is, after all, an activity that rests on social differences and social power and as such represents a significant factor of ideology of a society. The cultural capital of any society is a subject of struggle among social classes (see Bourdieu 1984; Urry 1997) - all trying to increase the volume of capital and the valuation on the particular form of capital they possess. Each social class has a system of classification, marked by practices, tastes and distastes, which they are trying to impose upon everybody else. Consequently, cultural capital becomes a matter

of symbolic competence necessary to appreciate art. Differential access to the means of culture consumption, resulting from a class system, is, therefore, crucial to reproduction of class and establishing dominance within society.

It is, furthermore, important that Croatia should not be discouraged by the Janus face of culture commodification. Yes, cultures - essentially living and learning forms - do tend to become subject to consumerism, lose their social role, their political function and their authenticity. On the other hand, the presentation of cultural artefacts is identity affirming and liberating, which is especially important for cultures, such as in Croatia, seeking to explain their traditions and values.

Since Croatia happened to have grossly missed the processes and effects of the collective tourist gaze, introducing culture into tourism in a big way at this moment may be its chance to become a destination for 'real holidays', an exclusive 'pleasure periphery' (Urry 1997 : 95), and, therefore, somewhat belatedly, an object of a romantic tourist gaze.

A holistic perspective on processes within Croatia's tourism/culture interaction should be introduced in order to serve as a signpost for future policy development.

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Effective Communication with Visitors at Heritage Sites

Frans Schouten

Less money, higher costs

Visitors, who cares about them, they come anyway, so why bother too much? Gradually, this attitude is changing within museums and heritage sites. Leisure and recreation are increasingly big business, and cultural institutions seek their ways to have a share of it. They have to: because the public can provide part of the necessary funds to maintain their business. The role of the government as funding agency is decreasing, due to lack of public funding as well as to the increasing importance of privatization and decentralization of policy responsibilities. It is not that authorities are withdrawing their support altogether. However, in Europe the emphasis is shifting from centralized state funding of museums and heritage sites to a situation in which these institutions have to earn at least part of their income themselves (Schouten 1995). In these circumstances, it is of vital importance for any museum or heritage attraction to raise the level of its income. This tendency is not only apparent for national institutions. A recent survey of provincial museums in the Netherlands showed that although the volume of grants from local authorities has hardly changed over the last years, the actual budget of the museums has increased due to greater fundraising efforts, sales, extension of services, and the renting out of space in the museum for receptions, dinners and even weddings (Siderius 1995).

This development, and the growing number of visitors, put some pressure on resources. In some places the National Trust has adopted a policy of even discouraging visitors to come to certain sites in order to safeguard the resources. The Trust has to protect its properties as well as to provide access to visitors. These dual objectives can be rather conflicting.

In some famous places like Venice, tourism and day-trippers have become such an annoyance that local people are deserting their own town, leaving it to the invaders. The Acropolis is worn out by the footsteps of the millions of visitors. In other cases attractions had to be closed down because of overuse of resources, like the tomb of Tutankhamun/Tutanchamon which cannot cope with the twenty-five litres of perspiration per day.

Despite all these threats, there are opportunities as well. Lascaux is closed due to the same problem facing Tutankhamun's tomb, but the Dutch National Museum of Antiquities will soon provide a virtual reality experience of these famous cave paintings. But the use of modern technology to catch the attention of the visitor is still rare in most of the museums on the continent, which are more conservative compared to some of the developments in museums and visitor centres in the UK.

Museums and leisure

In the world of museums leisure is still a rather suspect issue. Most professionals in this field prefer to ignore the impact of increasing demand on leisure time. They prefer to see their customers as lovers and connoisseurs of art and history and treat them accordingly.

Recently two publications from the Museums and Galleries Commission in the UK focused on this issue: 'Quality of Service in Museums and Galleries, Customer Care in Museums, Guidelines on Implementation' and - jointly with the English Tourist Board - 'Museums and Tourism, Mutual Benefit'.

Heritage is rapidly becoming an asset in the tourism industry and is heavily promoted by the tourist boards and local authorities. **Those who make the profit in this business are generally not the heritage professionals, but rather the tour operators who use the enormous amount of heritage attractions all over the world almost for free.** They take tourists from one place to another, often without much understanding or explanation of the physical remains of the past they are looking at.

Heritage professionals must learn to look into their own activities not only as a spending department, but also as an economic generator. Tourism and leisure are becoming a major foreign exchange earner all over the world.

What heritage professionals should consider is to look at their involvement in this industry and to reconsider their position in it. First they should stop their lamentations at seminars, conferences and annual meetings about the lack of resources. Instead they should make it clear that they have a business worth investing in.



Figure 1

Furthermore they should not treat the industry as a nuisance but as an ally. They share too many common interests to ignore each other any longer. It is remarkable to see how few museums make their expertise and authority available to the cultural tourism industry, which is clearly regarded with some disdain.

Whoever starts reading Kenneth Hudson's *A social history of museums* (1975) cannot avoid the impression that there has not been much change. Museums are still somewhat introverted institutions, distinguished and respected members of society, with a certain 'reservation' towards the general public.

A change in attitude

In the last decades there has been an enormous increase in the attendance figures of museums, so there does not seem to be a problem. But a closer look at the statistics show us that the amount of visits has been growing, not so much the amount of visitors (Ganzenboom and Haanstra 1989). In other words: the frequent users use more frequently, but new audiences are hardly reached. For large groups, museums are still regarded as 'not for our kind of people'. There are many reasons for this misconception among the public. For one thing they have to learn that learning is done by people who are curious, who wonder about the world around them, and not by people who might be intimidated by our so-called educational displays. A lot of the communication in interpretation centers and museums is not inviting but just pedantic. Gradually this attitude is changing. But there is still a gap between the way most of the heritage professionals see their core product and their visitors and the way their customers evaluate the services provided. In terms of quality management: the critical quality features of the visitors do not match with the actual product delivered.

In most cases, the assessment of the heritage attraction by the visitors is not based upon the scientific correctness of the core product, but on how effective the site or the exhibition is in raising curiosity, appealing to fantasy, and in providing a challenge. It is also based on items such as: how clean are the toilets, how easy to park the car, the choice of items in the shop, and the quality of the catering.

If the visit is not providing such a kind of experience the management will be facing the very common phenomenon in museums: museum fatigue. One of the first research projects on museums was Melton's 1935 investigation in which he discovered - or rather first described - this well known feeling. This sensation, that you have a cotton-wool head, leaden legs and painful feet, is an experience with which we are all familiar. **Museum fatigue leads to a specific behaviour amongst museum visitors: the longer they stay in a museum, the faster they move towards the exit; and the greater the length of time visitors spend in the galleries, the less attention they pay to the displays.**

In most cases, the world represented by museums is not the world as perceived by the general public. It is a world structured by scientific laws, by taxonomy, and by a division in periods, which is not at all common ground for the lay person. **Museum professionals tend to forget that what is obvious for them is not clear to anyone else.** Curators - who spend their lifetimes reading books - consider words and letters the only medium to transfer an idea. But the era of the TV has brought into being a generation for whom reading is a secondary means of collecting information. Their learning is primarily focused on visual impact and they are used to receiving very well-staged images. For those used to looking at large amounts of TV and films, the staging in museums is not only poor, but often absolutely incomprehensible (Schouten 1993).

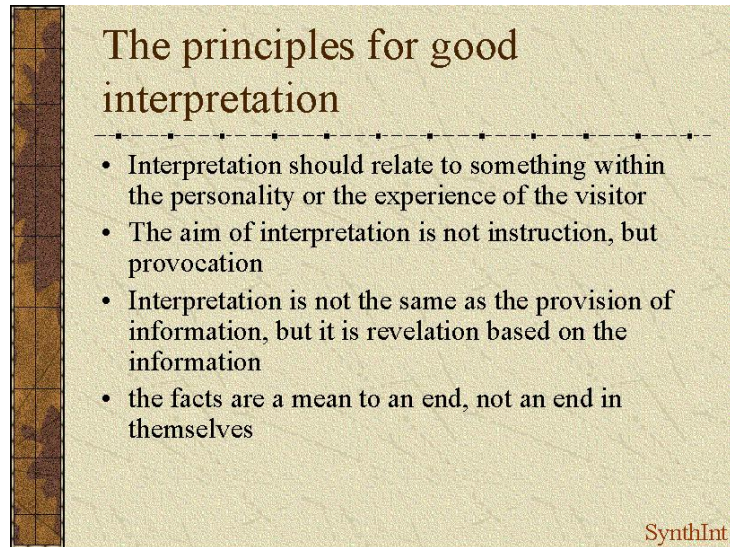


Figure 2

Communication in museums is rather conventional: everyone is presumed to start from the same point and to undergo the same knowledge-enhancing experience at the same pace. Thus the visitor plays the passive role and the museum the active role. Access to museums is highly structured, predetermined and controlled by the staff so as to be 'correct', 'understandable', and 'educational' (Ames 1985). It is common in museums and heritage sites to presume that the visitors come to learn something. However, this is not their prime concern, although they still insist on saying so in all the visitor surveys. However, a number of recent studies about the public demonstrate that they do not learn a great deal (Miles, 1986). **They come to entertain themselves with a little seasoning of education.** Another neglected fact is that one of the most important reasons to visit museums is the opportunity for social interaction. Research done by Paulette MacManus (1987) in the Natural History Museum and the Science Museum in London shows very clearly that a visit to an exhibition is a social occasion. Visitors hardly ever come alone, they present themselves in small groups as a family, a group of friends, etc. Visiting the displays is a means to interact with each other.

The cornerstone of any policy on effective communication with visitors in museums and on heritage sites is first of all, pleasure. It contains what I would like to call the UNIQUE-experience, which stands for: *Un*common, *N*ovelty, *I*nformative, *Q*uality, *U*nderstanding, and *E*motions (Schouten 1995a).



Figure 3

Effective communication is like a good dinner; it consists of an appetizer, an hors d'oeuvre as introduction to the theme, a main course as the actual information transmitted, and a desert, a digestive to provide the opportunity of final integration of the presented information. The visitor must be challenged by our communication, his or her imagination must be activated, and there must be a sense of discovery around the place, which actuates the willingness to undergo new experiences and information. A massive series of modern aids and techniques are available for the heritage professional to lift his or her place out of the ordinary and into the attention of the modern visitor. These devices can both enhance the experience of the educationally motivated visitor and the leisure seeker. But even more important than the technology is the approach of the presented theme and items from the perspective of the lay person, instead of the professional colleague. To take as the starting point of the displays not so much the objects, but the story you want to convey. A story based as much on the questions and the existing images the visitors have on the subject, as on the facts as known scientifically. Such an attitude may help to make museums and heritage sites a better place to stay for the enjoyment of the visitors, and to give museums the place in the leisure industry they deserve based on their rich resources.

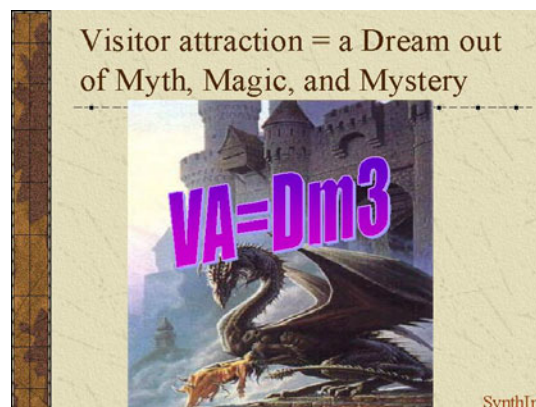


Figure 4

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Cultural Clusters and Tourism Development: the Challenge of Venice

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Introduction: Cultural tourism and the cultural cluster

Cultural tourism is a booming market. The World Tourism Organization estimates the yearly growth in travel motivated by culture at 10-15 per cent (WTO 1996) against an overall average of 4-5 per cent for the tourism industry in general. Since heritage attractions are mainly found in cities, cultural tourism is naturally associated with urban tourism. Competing urban regions invest in cultural facilities and in the infrastructure needed to host cultural tourists, seeking a direct impact on the economy and an induced enhancement of the quality of life. Increasingly, a first-class cultural capital represents a precious location factor which adds to other traditional factors (accessibility, the fiscal climate, human capital, stability) to determine the city's competitiveness in the global economy (Dziembowska-Kowalska and Funck 2000).

The spatial organization of cultural resources in the city and their relation with the infrastructure (hotels, transport, shopping malls) are critical to the success of a development strategy based on cultural tourism. As recent research has shown, the territorial agglomeration of cultural assets has a number of consequences for their sustainable use (Anzuini, Strubelt *et al.* 2000). A concentrated resource base allows the maximization of the tourist experience and the reduction of information barriers, thus enhancing the value of tourist products, but it also increases the potential for conflict with city functions other than tourism. These two contrasting elements have to find a balance in the organization of the 'tourist cluster'.

The cultural sector of a city consists of (1) the physical and intangible characteristics of the city, such as its cultural heritage and its 'atmosphere' and (2) of cultural facilities in the broadest sense, including happenings, exhibitions, institutions, and the infrastructure, e.g. theatres, museums, galleries, libraries, recreational facilities, retailers (De Brabander and Gijbrecchts 1994 : 828). These 'core' elements of the city's tourist attractiveness are consumed by visitors in conjunction with secondary or complementary goods such as hotel rooms, meals, and typical products, and with the necessary urban infrastructure (Jansen-Verbeke, 1988). In the so-called 'heritage destinations', while core products are to a large extent immobile and irreproducible, the complementary activities are free to relocate in a wide tourist region. This fosters a visitor mobility that overlaps - and in most cases conflicts - with the functional and financial viability of the city. In this work, we analyze the organization of the tourism industry

and the policies that may improve the spatial balance of tourism development and bring forward sustainable development. The case study of Venice offers some insight in this respect.

Evolution and sustainability of cultural tourism in cities

The progressive enlargement of the spatial scale of tourism activity is a recurrent feature of tourism development in historical sites and heritage cities. The increasing popularity of cultural tourism brings about development and physical transformation in historical cities, but it faces the constraint placed by the limited and inflexible nature of central premises and resources. As a consequence, the tourism industry - though privileging proximity to central assets - is pushed to expand and diffuse in *tourist regions* that could be conceived as 'functional regions' with respect to destination areas. Such spatial dynamics are by no means without consequences for the viability of cities; one may question whether development models such as Ashworth and Tunbridge's (1990) would lead to some kind of stable - or sustainable - long-term equilibrium.

A well-developed stream of research (for an exhaustive review of this literature, see Da Conceição Gonçalves and Roque 1997) identifies a cyclic pattern of evolution in the development of tourism destinations. The original formulation of the 'life-cycle' scheme, introduced by Butler (1980), uses as an indicator the absolute number of visitors. In the earlier stages of tourism development, the city attracts visitors that are essentially commuters. The interest in the city may never reach critical mass making it a destination for overnight stays, but if it does, investments are begun into infrastructure, services and promotion. The city eventually enters a stage of take-off, in which the material and immaterial benefits accrued by tourism activity increase dramatically and the local economy gets a boost. However, as tourist pressure approaches capacity thresholds, overcrowding follows, leading to stagnation and eventually to decline if the environmental characteristics of the site are affected to the point that visitors turn to competing destinations. An extension of the basic life-cycle model introduces a qualitative element, the kind of visitor that is attracted to the destination (Van der Borg 1991). A close scrutiny of the characteristics of visitor flow in destinations at different stages of their cycle suggests that not only does the absolute number of visitors change, but their mix changes as well, with major consequences in terms of associated costs and benefits. Each stage of the life cycle is associated with a specific spatial distribution of the costs and benefits arising from the tourism activities. The wider the spatial disconnection between the area that benefits from tourism and that which bears the associated costs, the stronger the diseconomies and the magnitude of the negative effects to be expected from further tourism development. The extent of such divergence is determined by the structural characteristics of the destination. The typical medium-sized European 'heritage destination', with a poorly specialized economic base and a dominant tourist sector, is particularly exposed to the harshness of the dynamics described above.

Clusters and tourism in heritage cities

The standard theory of industrial organization suggests that a clustered organization of production leads to positive *technological* and *pecuniary* (or *location*) externalities. While the former crucially depend on a certain degree of cooperation between the actors involved in regional production, the latter are also present in a strongly competitive environment (Krugman 1991). In the case of contemporary heritage cities, a clustered organization of cultural-tourist

activities appears fundamental to support a lively environment, faced with the spreading and 'banalizing' force of tourism economics. However, we should consider whether a cluster of cultural activities can be identified in the typical 'heritage tourism' destinations, and to what extent, if present, it is beneficial to urban sustainability. This attribution would require a configuration of the relations between actors which is not guaranteed by mere proximity or functional integration. Authors such as Britton (1991) and Tremblay (1998) argue that the tourism industry is only 'partially' industrialized. In fact, it is argued that the cultural-tourist industry is presently closer to the 'Fordist' paradigm (possibly evolving towards more flexible production arrangements in some parts of the *filière*, determining a 'neo-Fordist' environment), than to the post-industrial, flexible, innovative and consumer-oriented model that characterizes successful cities and regions in the global economy (Ioannides and Debbage 1998; Russo, 1998; Van der Borg *et al.* 1998; Shaw and Williams 1998). This peculiar structure of production relationships is determined by the very nature of historical cities. In such places, tourism production is not embedded in an economic environment in transition towards post-Fordism, and at the same time is not self-sufficient enough to be completely moulded by the strategic behaviour of international actors - as would happen, for instance, in a theme park or a leisure resort (Haywood 1998).

The economic weight of the packagers of tourist goods dominates the process of production offering few chances of coordination to local distributors who tend to be poorly organized and hyper-specialized. To offer a package including a Gondola tour in Venice is still more profitable to the industry leaders than to offer 'alternative itineraries' or visits to niche museums, as long as there is no strategic co-ordination between them and the local cultural sector. The latter is not prone to form strategic alliances with the tourism industry for a variety of reasons. First, its 'mission' is not explicitly commercial, and cultural producers are still diffident about entering a global market where they feel they may lose control over the quality and property of their artistic production. The same applies to museum organizations, especially in the public sector. Secondly, non-profit industries - for instance those providing access and interpretation of public goods such as historical assets - may lack motivation for product innovation and market strengthening. Thirdly, international actors can hardly side-step such weaknesses by promoting alternative, man-made resources as tourist attractions, both for lack of central space, and because the image of the destination is clearly geared to the 'historical' character of the experience. On the whole, the 'primary tourist sector' proves not suitable to face the challenges of international competition and to maintain the comparative advantages enjoyed by heritage cities. This may eventually lead to the weakening of the social and economic bases of the local economy.

Therefore, the question arises as to whether there is, in fact, any chance for places like Venice or Bruges to survive as cities, if not as tourist destinations. Or is their ultimate destiny that of sinking in souvenirs, postcards, lace shops and picnic litter?

A compendium of tourism policies. From regulation to 'synergetic' tourism management

Whatever the angle of observation - the spatial-economic approach of destination cycle theorists, or the 'district approach' of economists, cultural tourism needs forward planning. Spontaneous tendencies may prove detrimental. Market failure arguments, as well as the 'public good' characteristics of the heritage, demand corrective actions to 'steer' the process of

development towards efficiency and sustainability. Government intervention may come in different forms. Policies for tourism development vary in scope and context.

Demand-side policies and supply-side policies

Demand-side measures - both of the *hard* and the *soft* type - are typical of a short-term approach to tourism management, merely focusing on visitor flows. Their objective is to reduce the stress created by tourism and to smooth congestion. This approach has been a natural 'first reaction' to the huge increase of mass tourism that has occurred in heritage destinations in the last decades. Zoning and restrictions have been popular throughout European destinations in the years of 'heavy planning', from the 1970s to the first half of the 1980s. Cities adopted master plans that treated tourism as a sector to be isolated from others in order to prevent conflict with the resident populations, minimize the occasions of 'cultural confrontation' and reduce the costs of tourism management. Whole portions of the inner cities were given up to tourism development (e.g. the case of the 'concentration model' in Bruges (Jansen-Verbeke 1990)), while others were reserved for residential use. In addition, softer tools - like tourist taxation, parking restrictions and various incentives - have been implemented with varying success. Though this approach reflects the 'agglomerated' nature of the cultural heritage, it has had limited success (Van der Borg and Gotti 1995). In fact, it relies on three somewhat unrealistic assumptions and a major weak point. These assumptions are (1) that the greatest part of the visitors are 'staying' (residential) tourists, so that regulating the number and location of accommodation options automatically constrains tourist demand; (2) that visitors are sensible to price barriers; (3) that restrictions are fully enforceable. In fact, all these three statements have proven wrong or seriously faulty. The 1980s have seen the boom of 'short trips' and the enlargement of tourism regions with the rise of 'commuter tourism'. If the accommodation capacity is saturated in the city centre, or if prices are too high, visitors choose peripheral destinations and visit the city without spending their budgets there. In this way, limits on accommodation and other facilities are no longer a constraint to demand, which is free to expand almost indefinitely as new transport technologies shorten commuting times. Tourist regions expand over regional or in some cases national borders. Moreover, excursionism - as seen above - increases the costs imposed by visits and accelerates the tendency towards decline: 'bad' tourism chases away 'good' tourism. In some cases, zoning and restrictions are not allowed or hardly enforceable: national constitutions guarantee free access to all citizens to historical places; licensing policies, in countries like Italy, are very clumsy, and infractions are easily dodged and rarely sanctioned. Paradoxically, policies aimed at regulating the flows end up selecting against the most 'sustainable' form of tourism, the paying, residential one, and favouring the more mobile (and costly) crowds of day trippers.

Even *soft* policies (like incentives to booking in central facilities to reduce the convenience of excursionism) are easily side-stepped by excursionists who walk, consume packed-lunches and visit as few paying cultural attractions as possible. Anyway, there is a higher-order weakness in policies based on restrictions. It is increasingly inappropriate, for cities that wish to compete in different markets, to present their 'bad-face', discouraging visitors and repelling them. How can a city attract, for example, business travellers and at the same time make it difficult for them to freely move around and consume the city's resources? And can a city justify itself as a convenient residential location if its reputation is that of an expensive, awkward place for strangers?

For the many reasons exposed above, a number of active city managers and tourism authorities in Europe and elsewhere have recently focused their attention on supply-side policies. The rationale is that if it is very difficult to enforce tourist demand, the appropriate organization of the tourist products would stimulate its own desired market. Tourist demand is no longer taken as given, but something that must be bred over time and guided; the quality of information and the means of diffusion become the critical element of a tourist strategy (Laws *et al.* 1998 : 2). This approach requires that resources are available to invest in new attractions, the capacity is there to plan ahead and to coordinate, and the development of marketing skills. Needless to say, these elements are often lacking in local administrations. Their budgets for culture and promotion are shrinking and their marketing orientation is generally poor (Garrod and Fyall 2000). Only a few cities were effective in organizing new routes and products with a significant impact on the composition and spending pattern of the visitor flow (good examples are, for instance, Antwerp, Bilbao, Rotterdam, Aix-en-Provence, Naples, etc.). Most cities cannot even convince private and public cultural institutions to coordinate calendars and events. Moreover, as we have argued before, sustainability of tourism is not sufficient for urban sustainability. That is, even if a city is very successful with its tourist sector, and manages to increase the receipts from tourism by maintaining a high quality level of products and attractions, this does not guarantee that other sectors will score well. In fact, it is possible that they are *crowded-out* by high paying, revenue generating tourist activities, again exposing tourism itself to the unstable structural economics that contributes to a sharp life-cycle.

A 'synergetic' model of tourism development: the cultural cluster

From the above, sustainability requires that the attention of tourism planners is extended to other sectors. The relation of tourism with the rest of the economy is the issue, and the *orgware*, the organizing capacity (Van der Berg *et al.* 1997) of the institutions leading the change, becomes the critical element of success. Policies aiming at harmonization of tourism growth with the general development of the local economy imply that a 'synergetic', systemic development model of tourism is adopted, with the following characteristics:

- it focuses on the entire chain of value of cultural tourism;
- it balances the spatial dispersion of tourism benefits with the creation of a 'cultural cluster';
- it strives to maximize the impact of tourism on the other sectors of the urban economy;
- it is instrumental to the development of high added-value sectors;
- it aims at optimizing quality rather than maximizing quantities;
- its approach is integral and long-term.

Figure 1 describes various potential linkages within the cultural industry and between it and the rest of the environment. The first set of relations (A in the horizontal block arrows) to be re-shaped in the cultural cluster is the range of intra-industrial linkages among the actors in the cultural sector, defined as *strategic alliances*. Cooperation and process coordination can be established between the different fields of cultural production, such as the heritage sites, the performing and visual arts and 'minority' cultures, the 'creative industries' of hi-tech and hi-touch, such as design, fashion, software developers, and the events industry, as a whole set of mass-media and logistic organizers.

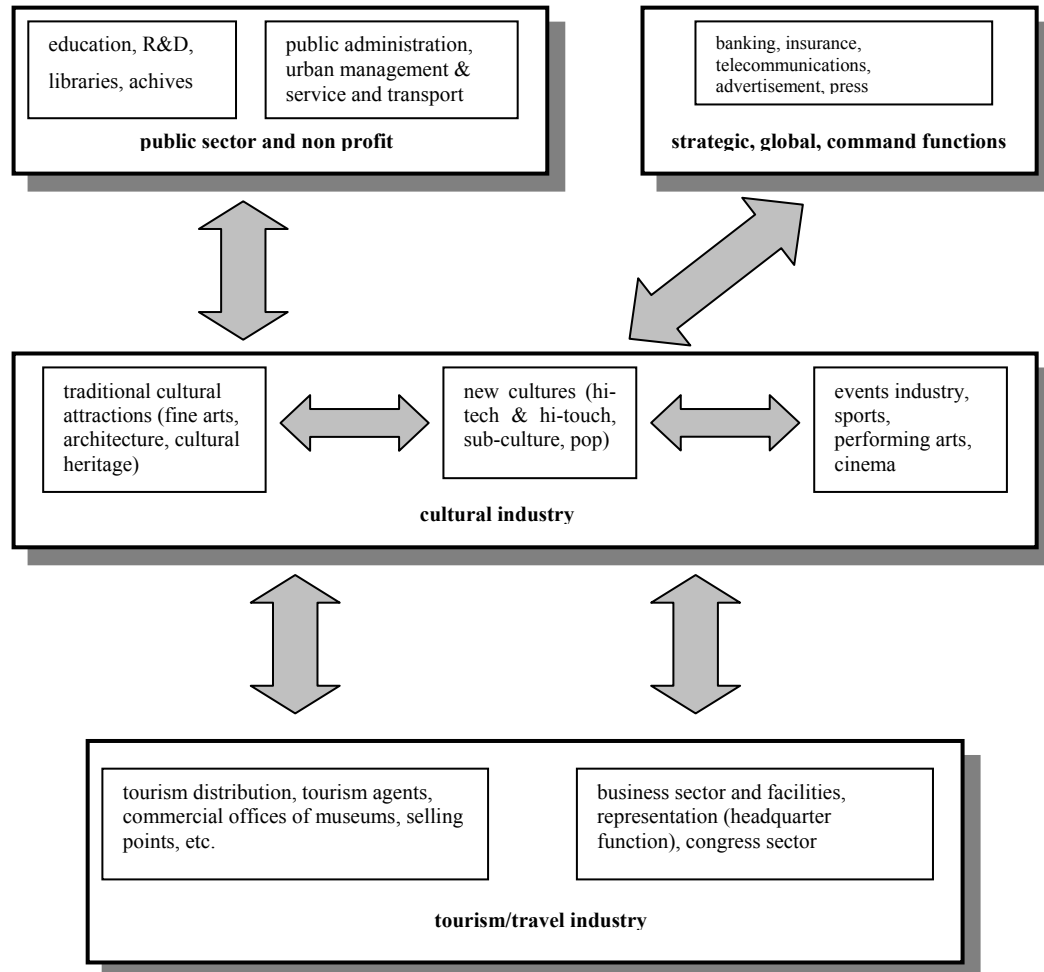


Figure 1 The cultural cluster in heritage cities

The combinations and linkages between these fields vary. For example, new technologies are applied for the creation of services or products that are supplied together with the traditional visit to the cultural attractions to elicit cultural content (ICT access to the heritage, audio-visual and multimedia support to cultural experiences, etc.). The system of traditional attractions can supply attractive locations for congresses and meetings; the same venues can host and deliver the sub-cultural production to large audiences, achieving diversification of the target of cultural tourism. Hi-touch industries can support pooled markets highly attractive for business tourism and events (e.g. fashion, music and fairs); design and software can be utilized for developing new and highly specialized niche segments. Cinema festivals can present the output of local schools or organize special sections about local culture and landscapes. The proximity of these activities is fundamental, for the open circulation of

human skills from one sector to the other and the reciprocal evolutionary ‘contamination’ it implies (observed in fast growing cultural districts of global metropolises, like the West End in London, the Village/Soho and, more recently, Chelsea in New York, Kreuzberg and Mitte in Berlin, etc.).

The second set (B) are the vertical linkages identifying supplier-producer-consumer cooperation at any level of the chain of value of local cultural production regarding product development from the basic inputs (education, research), the administration and the services to the distribution (within and outside the traditional tourist channels) of the assembled cultural product. The formation of partnerships and multi-purpose inter-industrial linkages are at the heart of this strategy. Strategic product disintegration (as opposed to a trend in integration that increases the economic ‘rationality’ of the enterprise but undermines its socio-cultural embeddedness) allows the cultural cluster to adapt to the ever-changing nature of the tourist market. The issue is the ‘glocalisation’ of the value chain of tourism, with a closer cooperation between trans-national operators and local dealers who also act as fundamental ‘brokers’ between the tourism market and the local communities, increasing the cultural sustainability of tourism development.

The third direction of networking (C) regards the formation of diagonal partnerships between the cultural industry and other strategic sectors. In this way other industries seek to diversify their product lines adapting to the local conditions (Poon, 1993; Buhalis, 1997). From the point of view of local businesses, such partnerships can be seen as successful efforts to reach a global market through non-local linkages.

The experience of Venice: from ‘hard regulation’ to ICT tools for sustainable tourism development

Venice is a well-known international attraction, possibly the most famous heritage city in the world. Yet few people could imagine that its historical centre (henceforth: Venice HC) in the heart of the lagoon is a ‘problem area’, whereas the inland section of the city is well integrated in a booming regional economy (cf. Fig. 3). With young households pushed out of the centre by inaccessible housing prices and lack of high rank specialized jobs, the population in Venice HC passed from 170,000 to 70,000 in the process of half a century, and is still decreasing at a yearly rate of around one per cent. The physical characteristics of the isolated central town provide further reasons for moving outside the town following the jobs. The reoccurring floods are a source of economic uncertainty. At the same time, the tourist pressure on the city increases, leading to an exponential trend in the tourist/resident ratio, now reaching 50 visitors for each resident of the HC¹.

Though at a first glance the tourism economy is strong, it is perceived as volatile and knotty, at least as it is organized today. The local government is indeed striving to reinvent and diversify the city’s economic vocation, providing a solid alternative to tourism. The vision of Venice as the ‘meeting place’ of an economically thriving region, infrastructure node and education centre, capital of culture and artistic production, praised by well-educated and informed visitors, is gaining ground among the circles of scholars and sensible politicians.

¹ 175 visitors for each resident of the HC if the excursionists are considered as well, on the assumption that each visitor will reach the HC during their vacation, adding to the mass of tourists staying overnight.

However, this promising future has to face the reality of a city that is sold for cheap to the huge crowds of visitors, and is abandoned on a daily basis by institutions and companies.

Political instability and interest groups have dominated the local scene for years, though recently a directly elected mayor started a wide-ranging programme for urban recovery.

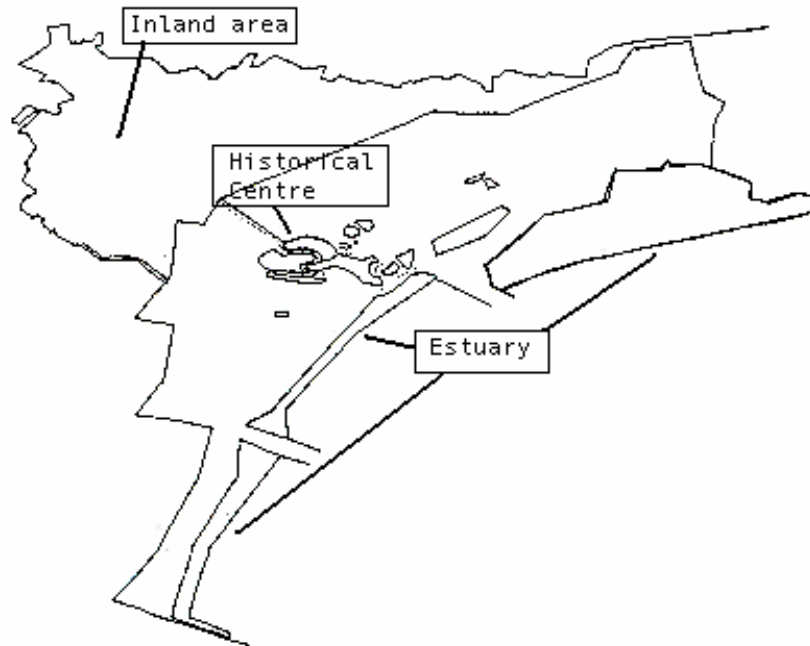


Figure 2 The Municipality of Venice with main subdivisions

Spatial-economic traits of tourism development in Venice

At the end of the seventies, the changes in the structure of the economy - with the explosion of mass tourism - and a renewed interest in urban planning brought about a wide-ranging reflection about the 'possible options' for the development of Venice. One result of this debate was the necessity to quantify the tolerance of the city with regard to tourism, as it seemed clear that the costs of tourism could become unsustainable and compromise the endurance of the city's functionality and economic soundness. Canestrelli and Costa (1991) adopted a linear programming method to estimate the optimal level and composition of the tourist flow which is compatible with the full functionality of the different sub-systems used by citizens and tourists alike (transports, waste-collection, access to cultural institutions, etc.): the socio-economic carrying capacity. These experiments indicate that Venice could absorb a total number of about 22,500 visitors, but only a maximum of 10,700 of these should be excursionists. These limits were surpassed in 1987 on 156 days in the year (Costa, 1990); the number of yearly violations has been increasing since then, despite any attempt to smooth the tourist peaks through regulation and planning.

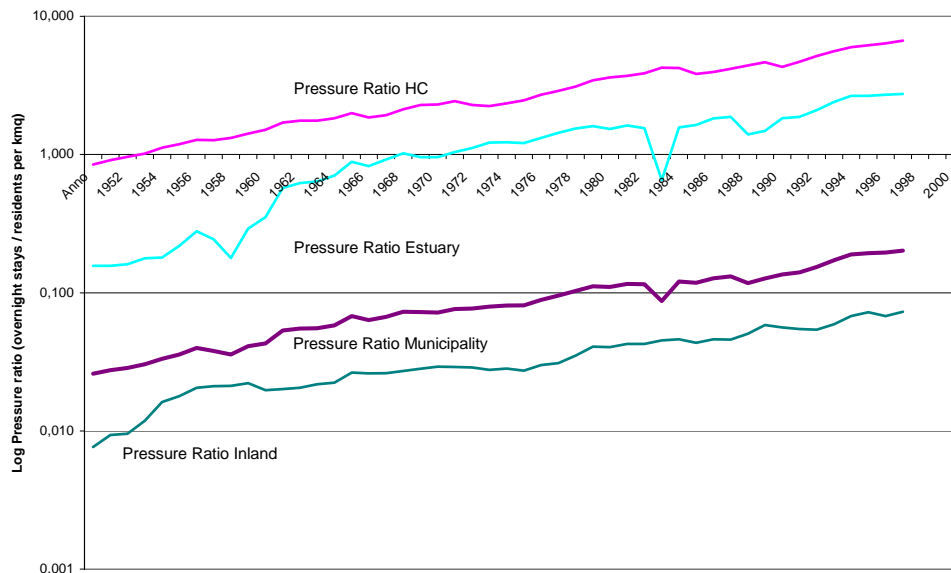


Figure 3 Visitors to residents ratio per km² in different sections of Venice municipality, logarithmic scale, years 1960-1998. Source: elaboration on ISTAT data

The tourist region has surpassed by far the provincial scale, extending in some cases to foreign countries like Austria and Slovenia. An examination of the composition of the visitor flow demonstrates the extent of the economic leakage provoked by the expansion of the tourist region, with high-budget tourists counting only for the 35 per cent of stays and day-trippers progressively increasing their share in the last ten years. Estimates (Manente and Rizzi 1993) suggest that the expenditure of a staying tourist in Venice is on average 30 per cent higher than that of an 'indirect' excursionists and almost three times as much as that of a 'real' day tripper. Residential visitors are still increasing at a rate of 3.4 per cent each year, a pressure which saturates the occupancy rate of hotels in the city centre over prolonged periods of the year. Yet, the growth of day trips is even higher. In fact, hotel prices for a given category decrease constantly in relation to the distance from Venice's historical centre. This enormous difference in tourist prices explains the emergence of this curious character, the 'false' day-tripper, whose aim is to visit Venice but prefers to spend the night in its environs.

Such an inefficient pattern to the visits bears a direct relation to the performance of the cultural tourism industry. As a result of the combined effect of congestion and lack of information, some cultural resources are under-utilized while some others are over-utilized. On the whole, far fewer visitors are able to enjoy the cultural heritage than the city could afford. The quality of the tourists' experience is eroded by various impediments and time lost in queues. Apparently, the set of cultural resources in Venice is not working as a true 'system', fragmented as it is between a host of management and ownership bodies, without a common strategy or a unique selling point. Zago (in Di Monte and Scaramuzzi 1997) counts at least ten directly responsible institutions, public or private, for the museums of Venice. Only one out of four visitors comes to Venice to visit something in particular; the same percentage pays to go

into a cultural institution during their visit (ICARE 1997). So, even if Venice markets itself as an art city of major importance, the return from its cultural system is disappointing.

The various analyses about the use of the cultural institutions make it quite clear that a link exists between visits to such institutions and the length of the trip (e.g., Richards, 1996). The question is quite simple: the Venetian cultural supply is so vast that it could satisfy the demands of a public with quite different preferences, if this public were adequately informed, had the possibility to book their visits, could improve the information content of the visit, and could combine their own visit with opportunities for leisure and entertainment. When access to the city becomes problematic, the very interest for its cultural supply diminishes, as well as the willingness to pay for it. Therefore, the capacity of the most central cultural institutions becomes a bottleneck to the whole network. A annually congested Dukes' Palace may well cause a leakage of visits to some adjacent attractions (as is shown by survey data), but it is likely to decrease the share of tourists coming - or returning - to Venice for a cultural visit.

However, it was not just the quality of the primary tourist product of Venice to slump in the last years. A far more evident phenomenon is represented by the decline in the quality of complementary facilities and, in general, in the commercial structure of the city. This process of reorientation to meet a pervasive tourism pressure could escape any control or regulation targeting specific goods or categories. The result is a simplification of the economic base of the city. Available data (Van der Borg and Russo, 1998) indicate an on-going concentration of tourist activities in the most central areas. Most importantly, a notable substitution can be seen of activities related to the cultural, high-quality visits with others that are oriented to the low-budget/low-elasticity segment of the visitor flow. *These data seem to contradict the simple assumption that concentration of tourist-cultural facilities results in a more viable tourism development.*

Policies for tourism development in Venice

The spatial-economic traits of tourism development in Venice, as synthesized above, suggest which critical points have to be attacked to reduce a declining drift in tourism: 1) containing the expansion of the 'tourist region', favouring overnight stays; 2) rationalizing the mode of tourist use of - and access to - the city; and 3) containing the process of quality decline of tourism products. As Section 3 suggests, these points can either be dealt with adopting a demand-side approach, a supply-side approach, or a systemic or 'synergetic' approach which explicitly considers how tourism is embedded in the local production and consumption systems. On too many occasions, tourism policies in Venice have insisted on the first one only of these options, merely considering demand-side management tools of the 'hard' type, with noticeably poor results. The first attempts to regulate the tourist flows resulted in a more or less explicit policy of restrictions. The number of tourist beds in the Historical Centre has been limited by law to 11,000, and the scarce capacity of parking space close to the centre further diminished the possibility of reaching Venice by private means. Moreover, whole portions of the city space have been virtually sectioned off for tourism. There is only one access to the city centre, commanding a limited number of 'tourist routes' utilized by 90 per cent of the visitors to reach the attractions located around St. Mark's square. The bad reputation of Venice as far as prices (and treatment) in restaurants, gondolas and other tourist facilities are concerned represents a non-explicit means of regulation in the eyes of residents annoyed by the vociferous tourist crowd.

These measures have favoured rather than discouraged the 'excursionist' mode of use of the city, reducing the reach of *hard* regulation tools. At last, the poor return of this approach has been acknowledged by decision-makers and public opinion. However, it would never have reached the top position on the political agenda were it not for a series of accidental occurrences. First of all, the boom of day visits from former communist countries occurred in the late eighties. These visitors would spend practically nothing, pushed congestion to the extremes, and produced a lot of waste, for which Venetians pay the highest collection tax in Italy. The public resentment, misunderstood at that time as 'touristic racism', was a decisive factor in making it clear and substantial that 'not all tourism is good' and that 'tourism may change for the worse' if unguided. Another mass-event threat, the International Expo 2000 advocated by part of the then-ruling political forces as a 'last chance' for modernization, was finally turned down after the mobilization of public opinion, supported by national and international organizations. Supply-side policies based on *soft* interventions could provide the right answer, if accompanied by demand-side policies truly selecting against the bite-and-run way of visiting the city. As for quality controls, the issue is very complex and cannot be attacked except indirectly, placing adequate attention on the core Venetian tourist product. This entails a re-organization of the cultural sector based on the concept that the value of cultural visits should be improved and that the various assets function as a system where commercial aspects are as important as - and integral to - the production and formation in culture-related fields. However, all this might not be enough: when cultural tourism is restructured, the rest of the economy must be regenerated as well. That is an even more difficult task, because it has to do with structural problems and global trends. Moreover, the organizing capacity to accomplish a thorough change in policy orientation - though greatly improved in the last years - might still be insufficient. The poor reach of community involvement programs like Local Agenda 21, the frequent political crises, the declining confidence in politicians, the increased power of groups up-holding sectarian and populist stances, the continuous impediments to the realization of a wide-ranging revitalization programme, the increasing disconnection between Venice and its region - these elements cause increasing difficulty regarding the capacity to change and implement a vision for a 21st century, post-Fordist, sustainable Venice.

Recently, new projects have been started, that may finally trigger off a virtuous process, as they address - and are likely to improve - the spatial and industrial configuration of the various elements of the Venetian tourism system. On the marketing side, a number of projects for the promotion and commercialization of the cultural assets as an integrated system have been agreed upon overcoming a long-lasting fragmentation in the management and ownership structure of cultural goods (common ticketing, coordination of events, websites, creation of marketing structures, etc.). Pro-active cultural marketing is a novelty for a city that used to consider its international fame sufficient to attract a steadily growing flow of visitors. Moreover, there is an effort to link the existing resources through advanced communication technologies, with the provision of remote archive and information facilities. Internal accessibility will be enhanced with the rationalization of water transport, the diversification of access points to the HC and the creation of alternative itineraries. Today, more attention is paid to the quality and variety of cultural products. Prestigious projects (museums, concert-halls, meeting venues) have been launched, and modern architecture will add to the complex fabric of the city, providing a precious infrastructure for product diversification. On the regulation side, the 11,000-bed barrier to tourism expansion has been overcome by a new law that facilitates the renting of private rooms. This results in an enlargement of the supply targeting the lower section of the tourist market. These measures represent a step towards the self-reinforcing

dynamics of a 'cultural cluster'. Without going in depth into such projects, the next section analyzes their requirements in terms of infrastructure and capacity.

A tool for the development of cluster relations: the application of ICT in the tourism industry

In the above discussion it has been highlighted that a key problem in building a sustainable tourism cluster is the lack of cultural empathy among a) tourists; b) tour operators; c) local tourism/cultural organizations; d) local hospitality providers (esp. SMEs). Although there are diverging economic interests and differences in roles, it is believed that mutual understanding can be increased utilizing the proper educational and relational tools, and this could exploit the possibilities offered by information and communication technologies (ICT). The multi-system nature of ICT appears promising as a vehicle to stimulate positive side-effects to tourism development and to improve the coordination of the actors and institutions involved. It is crucial to this aim that the ICT apparatus is diffused to the tourist sector as a whole, connecting cultural producers and linking the local network to the tourist industry. A first step in this direction has already been taken in 1998 with the formation of a public-private partnership for the electronic ticketing of four museums, the Cathedral and the Tower in St. Mark. Even if limited in scope, this project forges a path, which, if successful, can easily be extended to other levels of tourism management, such as transport, terminals, the hotel and restaurant sector, and the system of cultural resources. In particular, three 'technological' projects, still in their experimental stage, represent natural extensions and refinements of this approach.

ALATA (High-Adriatic Partnership for Sustainable Tourism) was originally set up as a system for the management of the visitor flow accruing to the north-eastern region of Italy on the occasion of the religious celebrations for the year 2000. There was the fear that an excessive number of non-organized pilgrims would cause intolerable congestion in tourist destinations on their way to Rome. Venice was expecting an estimated additional flow of 3 million visitors motivated by the event; hence the opportunity to divert this flow to other peripheral but well-equipped destinations with some cultural or religious attractiveness. In synthesis, the project's aim was the realization of a telecom infrastructure and a software for the collection, management, certification and redistribution of information on visitor flows on the High Adriatic territory, as an input to just-in-time provision of facilities for welcoming, assisting, accommodating pilgrims and tourists and facing possible emergencies. The system connects the existing transport, hotel and catering structure, realizing the 'links' and providing dedicated facilities. Even though the system had to operate in an emergency situation during the year of the event (which, however, is presently attracting a far inferior number of tourists than expected), the ultimate aim of the ALATA partnership is to utilize this system in the 'normal state'. ALATA achieves the multiple objective of coordination at the spatial level and promotion of selected facilities and attractions. The benefits will be even more apparent when the deregulation of the central accommodation structure is consolidated, with a number of small-scale private operators entering the market, and the need for coordination and shared facilities on the supply side increasing accordingly.

A second project, which more closely focuses on the 'cluster' characteristics of the cultural tourist system, providing an adequate infrastructure, is CALYPSO. This is a project financed by the European Community (DG XIII) for the realization of a *smart card* for the provision of a number of services in a coordinated and user-friendly way, integrating payments and banking services, urban transport, student services, any kind of bookings and information

to city users. The card works as a 'pass' (utilizing 'contact-less' technology) to access a number of facilities and functions. CALYPSO is being experimented in four European cities (including Paris, Konstanz and Lisbon). In Venice, partners in the project are the main public and private operators in the field of transport, banking, municipal services, the universities, the museums and a consortium that manages the religious heritage. The original project foresees the issue of two types of card, one for local users and one for tourists which can be 'charged' with services and electronic money at the moment in which the visitors book their visit and receive the card. The tourist card focuses 'on the promotion of specific types of cultural consumption and their integration with other aspects of the service economy'. The card is delivered for free to tourists when they send in the booking for their accommodation. The number of cards issued will be equal to the tolerance threshold, to be periodically determined. In this way, motivated cultural tourists get a better deal because they can more easily discover what is on offer, and then arrange their itineraries expediently benefiting from free parking, access to limited-number events, reduced time in queues, reductions in transport fares, etc. Meanwhile, the city is better off because it attracts relatively high-spending and organized tourists.

Such instruments would represent a 'juridically feasible and socially acceptable formula for having the visit to a heritage city paid for' (Di Monte and Scaramuzzi 1997), which would be an intelligent way to selectively market the city and spatially/seasonally smooth the peaks. On the other hand, the only drawback might be that opening up the local market there are greater chances that non-local operators may enter (e.g. tour operators, real estate agents), facilitated by the possibility of remote operations. However, that might not be a negative fact after all, if the activated 'diagonal linkages' also work in the other direction and allow local producers to easily approach outside markets. Overcoming the barriers to entry would make it possible to draw on the location rent on which such a large part of the Venetian tourist sub-economy lives, thus increasing the quality of the tourist experience. These projects attack the two dimensions of sustainable tourism identified in Section 2, namely the spatial and the industrial level. Basically, ALATA may help to spread tourism in a more efficient and rational way over the territory, achieving a *soft* demand regulation and associating it with high quality services. CALYPSO instead favours an 'integral' approach to the management of cultural tourism, unifying the services to visitors and infrastructure, lowering 'information barriers' which foster quality decline, and granting access to the electronic mall for non-standardized cultural production and events, side-stepping the bottleneck represented by an intermediary sector which is not prone to invest in 'novelty'. The points of integration and reciprocal self-reinforcement between the two projects are immediate. If ALATA works as a 'regional' infrastructure for the delivery of CALYPSO services, the cultural cluster of Venice can extend to the whole tourist region, realizing an innovative 'multi-polar cluster' which exploits the tourist vocation of a wider area of reference, further improving the efficiency in the organization of tourism.

A third and last example of the potential represented by ICT for sustainable tourism is the project of a 'Virtual Museum', which is being planned by the City Department of Museums. This structure should be located in the inland part of town, as a real 'access terminal' to the city. It will serve the city cultural system as an integrated centre of cultural mediation and interpretation of the heritage, providing seamless access to the digital image of the resources that one can materially visit in the city, as well as live experiences regarding the history and environment of Venice. Looking at the heritage from such a spectacular and original angle, visitors understand the context in which this heritage has developed. In this way, the quality of their tourist experience improves enormously, as they are able to establish connections and organize their real visit around various themes and suggestions, escaping in this way the 'tourist

bandwagon' cliché. Therefore, the virtual museum has the potential to affect in the desired way the logistic structure of the visits and the behaviour of visitors - e.g. the willingness to pay for cultural resources and the return patterns. Finally, in the intentions of the planners, the 'virtual museum' may become an incubator for local entrepreneurs in the media, design and cultural industries, generating precious knowledge and technical support for the development of an applied hi-tech vocation for the historical city.

Conclusions

Venice is a very good case of unsustainable tourism. What is under threat in Venice - 250 years ago one of the most powerful and populated cities in Europe - is culture in the broadest sense. Though the primary issue is heritage preservation, both citizens and visitors presumably want the city to remain a living entity, and not transformed into an empty stage, where the sterile representation of an act of consumption - tourism - is performed. A way out from this *empasse* stands in the recognition that Venice's cultural endowment is so vast that it can satisfy the demands of a public with quite different preferences. However, greater efforts need to be made to promote and sell this richness. The most expedient method is to set up an information technology infrastructure allowing visitors to access details about city sites as well as events, and to make advance bookings.

At the moment within the Venice city administration the idea of 'soft controls' exploiting the versatility of ICT seems to be gaining support. Pilot projects are underway for the creation of a network infrastructure connecting cultural institutions. The ALATA partnership of north-eastern Italian cities will use an information system designed to manage and distribute visitor flows. CALYPSO represents a fundamental infrastructure for a cluster economy where cooperation and competition go hand in hand. The Virtual Museum project promises to bring forward a new attitude of visitors towards the cultural heritage of Venice, increasing its attractiveness and comprehensibility, and therefore its capacity to generate value, while at the same time making tourists more curious and less predictable in the organization of their cultural itineraries. Much more needs to be done.

Despite the gloomy picture that today's Venice conveys, especially to its inhabitants, the debate about these topics is fascinating and rather productive. Venice needs not only to manage its tourism better, but also to diversify its economy. In a review of sustainable development options for Venice, scholars Rullani and Micelli (2001) suggest that Venice could become the capital of a metropolitan area specializing in producer services, from data processing to software design and finance; cultural industries such as musical and theatrical productions; and other activities from research to providing convention services. This requires a system of fast transport to reconnect Venice, an island that is relatively difficult to get to and from, to the rest of the region. Another vision is that of Venice as the capital of hi-tech and data processing, overcoming its physical isolation through electronic accessibility. Whatever path is chosen, it is now recognized that if the culture of Venice is to remain a living entity, the city needs to be refashioned into a place that exists for more than tourism.

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Cultural Tourism in the Transitional City

Priscilla Boniface

Introduction

This paper reviews cultural tourism as it features in a city in the process of transition. The aim is to offer a background and context to this particular circumstance and to identify those aspects likely to demand special provider attention. The objective is to show that, while each situation of transition will have its own characteristics, a basic framework of consideration is needed and is possible. De Bono says, 'You cannot begin to look for alternatives without a background concept' (1999 : 143). The requirement to evaluate and identify a situation for the purpose of determining how it might engage in cultural tourism will be portrayed. To exemplify certain relevant points, use will be made of the Southeastern European country of Croatia, and the city of Dubrovnik within it.

Evaluation, questions, and elements

A first activity is evaluation of what the individual entities of *city*, *transitional*, *tourism* and *cultural* may mean, and what they may have accrued as 'baggage', in the distinct milieu being discussed. Figure 1 (see next page) is a depiction of the certain important dimensions in the respect.

The city is by nature a centre for people and functions to gather. It portrays itself through the people who occupy it and pass in and out of it, and, very importantly due to the type of entity that it is, through its physical fabric. The city acts as a statement. It serves as 'a book' upon which is written, for all to see, its palimpsest of history. It shows also, in the style and types of the new buildings and monuments it erects, what its aspirations are and how it desires to be regarded in the future. The other important dimension to the city is that its whole existence, and location at a particular site, is customarily due to a strong capacity of being accessible. The phenomenon of the city wall has partly arisen to manage this accessibility, though also for the contrasting reason of keeping unwanted persons out, and for other aims such as denoting separation and exclusivity from others, making a political remark, and containing trade or keeping special rights within.

Figure 1

CITY	TRANSITIONAL	TOURISM	CULTURAL
Meeting place of functions and peoples	At point of particular change, and from one aspect to another	Brings outsiders	Focus on features of the lifestyle and way of
Visible statement - shows past - shows desires and aspirations	In condition of - movement and new opportunity - memory/reminder - unsettlement and some insecurity	Demands an environment of leisure and pleasantness	a place, as manifested through - fabric - attitude(s)
Accessible	Needs for leadership, participation, understanding and information	Requires relevant infrastructure, participants and local support	Year round and ongoing

To be in transition is to be at a point of particular change, and this change represents an alteration from one aspect to another. Change is widely accepted as being somewhat discomfiting and nerve-wracking for people, even if at the same time they see it as necessary and wanted, and to be viewed as an exciting idea and prospect. Therefore, transition can be recognized as the time of shift and fresh opportunity, while also engendering a clinging to existing 'security' and the drawing forth and heightening of memories of what will be left behind even further than before and which will maybe no longer be outwardly manifest at all. To manage this change and to create adherence to it demands a high calibre of leadership, the recognition among leaders of the need to involve and engage the ideas and participation and adherence to change of all those affected, and to take positive steps to create knowledge and understanding among these of the change occurring.

The essence to tourism is that outsiders are brought to a domain, in this instance the city. From the usual point of view of the tourist, tourism, since it is engaged in as a discretionary activity for relaxation and for enjoyment, needs to provide a pleasant (therefore high-standard of its type) circumstance which meets leisure requirements. Such an environment may be alien to a city whose role has hitherto been that of a milieu for *work*, and the manufacture and trading of goods. A new infrastructure may need to be forthcoming, and a different provision and attitude may demand to be installed in order to cater for *leisure* and outsiders. **Resident community support and understanding for such a change is paramount, otherwise they will not be minded to tolerate the disruption of change**, let alone to produce positive inputs, ideas and to make their own opportunities from the tourism arena being offered and create products suitable for tourists.

The words culture and cultural have both narrow and broad interpretations. In the sense of 'lifeway' the meaning is broad in the extreme and so can deliver a commensurately wide cultural tourism product to the point of being all-embracing. Culture manifests itself through the tangible and the intangible. In a city, the physical aspect is essentially the buildings and monuments and the unseen dimension is manifest through peoples' attitude(s). To the usefulness of tourism engagement, culture renders a tourism product that is seasonless. In reflecting the panorama of movement of peoples and attitudes, culture brings its own natural inbuilt capacity of product alteration and refreshment.

The city begins as an obvious arena for cultural tourism in that it contains cultural elements, and that in its essential existing persona it is a place of transport and accessibility. To accommodate tourism successfully, however, it will need to change and make adaptation. The *transitional city* is already in a process of change and so to add the change necessary to provide and operate tourism, whether cultural or of a different type, is to bring in two changes simultaneously. Such an effort will be challenging and demanding for all involved. **The changes towards tourism will need to be planned carefully and managed extra-sensitively and with maximum participation and involvement.** The need to which Page alludes (1995 : 8) for planners to consider tourism in cities among its other functions is never more essential than in the context of a city which is also changing its face in another way and fundamentally.

To plan tourism as a city presence, key questions need to be considered for finally answering the last key question which is what is the plan of action and implementation. These, presented in Figure 2 in outline, relate to the purpose that tourism is wanted to achieve, by whom and for whom, the city's character and raw material for use, what tourists should like the type and whether they can be reached, and what competitors cater to the same market.

Figure 2

KEY QUESTIONS

1. WHAT IS WANTED TO BE ACHIEVED? - by whom? - for whom?
2. WHAT IS *TOURISM* WANTED TO ACHIEVE? - by whom? - for whom?
3. WHAT ARE THE FEATURES?
4. WHAT IS THE CHARACTER?
5. WHAT TYPE(S) OF VISITOR 'FITS' THE PROFILE, AND ARE THEY OBTAINABLE?
6. WHO ARE THE COMPETITORS?
7. WHAT IS THE PLAN OF IMPLEMENTATION?

The answers to Question 1 serve to deliver the overall picture and context, to portray 'the players' and to identify their general objectives such as social integration or economic development. The replies to Question 2 give definition of what it is believed or hoped tourism can deliver towards the overall goals and those who have objectives in the domain and towards whose benefit they are aiming. By-products of the answers to Questions 1 and 2 will be revelation of any unwanted barriers being erected without a further change in the plan and whether cultural harmony is likely to be an outcome. Responding to Question 3 amounts to making a basic audit of facilities and entities. Answers to Question 4 show the difference of one

place to others that may be similar. The importance in focusing upon the cultural dimension of a city to use for tourism is that not one place will be *exactly* the same in its cultural make up, it will form a different mosaic from another centre. So the distinctiveness of a particular city will be portrayed.

The replies to Question 5 serve to find a match. Question 5 looks to find if a 'fit' of visitor exists for the kind of city defined, whether, if the market type exists, it wants what is available, whether it represents an audience that can be reached in terms of communication and also if it is able physically to reach the city.

Question 6 is asked to find any competitors so that an offer to tourists can be tailored and have emphasis placed so as to draw distinction.

Question 7 asks how the general identification can be planned for and implemented. The importance, as has been indicated already, is that planning should embrace all dimensions and so tourism endeavour and its blueprint should be regarded and placed among an overall and integrated matrix of objective, strategy, plan and implementation for a city.

The evaluation of how to approach cultural tourism in a *transitional* city requires special further enquiry of identification as is indicated in Figure 3. The complex situation of the transitional city must be thoroughly known and interpreted for tourism, whether for tourism to be continued there or for it to be engaged in afresh. This is for accurate planning and to engage well in tourism. The assessment exercise is likely to reveal particular challenges and items for treatment and attention. What needs to be decided first is what general type of transition is in process and it may well be that several kinds are happening and need to be taken into account. The product of transition is change and in the city this will be represented in many outcomes and perhaps most overtly manifest in a change of fabric (Hauptmann 2001).

As has been emphasized already, the outcome of compatibility in a transitional city adopting cultural tourism is that each of these has the characteristic of change as elemental to them, and in the instance of the latter it is because culture is ever dynamic and ongoing and because 'the tourist is a moving target' (Judd and Fainstein 1999 : 5). A critical feature of planning for transition and cultural tourism, with the presence of many cultures as the dimension, is the need for these cultures and attitudes to have room to speak, be represented and to mix and mingle. Cossons, introducing the Historic Environment Review Steering Group report *Power of Place: the future of the historic environment*, underlines the requirement that the stories of each cultural group in an arena need to be able to be shown, stating 'in a multi-cultural society, everybody's heritage needs to be recognized.' (Cossons, December 2000 : 1).

Figure 3

SPECIAL QUESTIONS AND ELEMENTS FOR THE TRANSITIONAL CITY INVOLVED IN CULTURAL TOURISM, OR ABOUT TO ENGAGE IN CULTURAL TOURISM

- What general type of transition is in process?
- Political?
 - Social?
 - Economic?
 - Professional?
 - Physical and environmental?
 - Role and identity?
 - Perceptual?
- What probable consequences and outcomes?
- Different/new ideologies
- changed priorities, points of emphasis
- Different/new context and geographies
- Different/new structures and mechanisms of approach, operation and management
 - flatter, or else more hierarchical
 - inclusiveness
 - training in new skills and functions
- Different/new congregations of people
- room to meet, manoeuvre, be a presence, be seen and heard, express fresh outlooks
- Different/new objectives and priorities
- fresh partnerships and altered dialogues
- Different/new facilities
- transport, accommodation, restaurants/café's, tourist information and guidance
 - promotional networks
- Different/new interpretation, presentation, care and animation
- of cultural sites, monuments, facilities, museums, galleries, concert halls, products
 - of streets and general environment

Croatia as an example

The country of Croatia represents a country undergoing several types of core transition e.g. political and social. This process, begun with the collapse and fragmentation of the Eastern bloc in 1989, which had the outcome of Yugoslavia breaking into certain units in 1990, and then by 1991 Croatia declaring itself independent, has been complicated and perhaps further extended due to war and friction among the units of the former country of Yugoslavia (Glenny 2000). Croatia's peak of hostilities was in 1991. The area's experience in relation to tourism is interesting in that this industry has long been a feature in Croatia and its economy. The focus of tourist attention has been the coast and, alongside, cities such as Dubrovnik, special among them for its Old City which was placed on the list of World Heritage Sites in 1979 and which soon after had an earthquake as one transitional outcome followed by the 1991 bomb damage as another. War has had its effects (Mikacic and Hendija June 1995) on tourism in Croatia and has required entry into a period of re-evaluation of tourism and transition (Hall 2000; Jordan 2000). Dubrovnik serves to demonstrate the change of background, mindset, attitude and framework that may be necessary in a city in a transitional position and where the vital items used to attract tourists are its cultural dimensions. It shows the importance needed of explanation and involvement throughout a provider community, building awareness and

delivering acquisition of experience among all providers about current tourism practice, including monitoring outcomes and performance and understanding target markets' levels of standards and types of expectations, rendering skills training necessary. It demonstrates the importance of the process that is very difficult to effect for any person familiar with their environment, which is to step outside it and look at it through a stranger's eyes. In the instance of tourism, the difficult imperatives are to realize what the visitor needs to know in terms of basic data for operating in the role of novice in an environment and to 'see' what the visiting tourist is viewing, expecting and seeking. Judd and Hainstein say, 'To appeal to tourists, cities must be consciously molded to create a physical landscape that tourists wish to inhabit' (1999: 5). The process of analysis and inventory by the provider outlined above is important but it is nonetheless only the preliminary. The aim is to deliver a 'conceptual toolkit' (Landry 2000: 163), to render the concepts in mind, to produce creativity of thought and to deliver ideas and alternatives (De Bono 1999 : 143) for choice among strategies to best meet a situation and to render distinctiveness among competitors. The desired approach is to show integrity and individuality of cultural product and express local values yet to manifest all this aspect in ways acceptable to the visitor and to which they can relate.

Conclusions

Establishing and operating cultural tourism in the transitional city is recognizably a complex and demanding circumstance. From the myriad features and matters for attention, maybe three aspects stand out and are crucially important for those participating in the process. These, below in Figure 4, could be termed 'the Three P's for embarking upon providing cultural tourism in the transitional city'.

Figure 4

PATIENCE: a long enough forward perspective and adequate resources to maintain it

PARTICIPATION: involvement and dialogue among all participants; fora of consultation and information, and networks and exchanges of skill and data

(NEUTRAL) PUBLIC SPACE AND ARENA: for all points of view to meet and to be able to be aired and presented

In addressing cultural tourism in the transitional city with all its opportunities and challenges, the temptation, partly because of these demanding circumstances, is to be keen to see the circumstance of transition as an unusual phase to be worked through before arriving at and settling into stable existence. While this might be a comfortable ideal, it may not be a realistic one. A slower pace of life situation of earlier days might have delivered an overall state of reasonable stability for quite long periods of time, though, of course, with an individual's states of life transition occurring. Nowadays, to assume that change, and even the rather major changes along the continuum of change which transition represents, is infrequent or unusual would probably be unwise. As Harvey says, 'activity and thought in the different theatres of action relate, combine, and dissolve into each other to create an evolving totality of social action.'(2000 : 253). Cultures seem likely to continue existing and being fluid and altering, tourism seems likely to go on being around and to continue developing; the city is becoming ever greater, more important and accommodating. So it must seem likely that transition is not

here for now and then gone into abeyance for a while but is a process here for ever, and that one of its main presences will be within the city which engages in cultural tourism. Therefore, the combination deserves much attention and learning to understand.

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The Role of Theatre and Music in Urban Tourism

Howard L Hughes

Introduction

This paper focuses on a particular aspect of 'culture': the performing arts of theatre and music. It is inclusive of both the 'high arts' and popular entertainment. (Unless otherwise indicated, the term 'arts' will usually be used in this paper to refer to the performing arts and to cover both these aspects.) There are a number of reasons for this focus including the complexity of the term 'culture' and also the view that each component of culture may have a distinct (though not isolated) role in urban tourism. The term 'culture' can be used to cover the whole way of life of a people or particular aspects of it; it may refer to buildings, to artefacts and texts or to activities; it may refer to heritage or contemporary aspects of culture. This diversity can lead to confusion.

All places experience activity in the performing arts but cities are usually centres of a diverse range and quality of arts activity. Their size and population density and diversity means they achieve a 'critical mass', which stimulates and supports activity in the arts both by and for the local population. Economies of scale present opportunities for cities to provide commercial opportunities for a range of activity. Most cities have a large number, and often high concentration, of theatres, concert halls, event arenas and similar performance venues. It is a self-generating process; as cultural centres they encourage others to move there and they stimulate the interest and activity of residents.

Historically this provision has been stimulated by local population demand, though in the case of holiday destinations such as coastal resorts, the situation has been different. Here, population increases have been temporary and seasonal but sufficient to expand the performing arts provision. The nature of the performing arts may well also have been different from that experienced in inland towns and cities. On holiday, there has been a desire for diversion and undemanding experience in the arts. The sun and sea have usually been at the core of tourist visits to coastal towns and entertainment has been at the periphery.

The arts-tourism connection may therefore take two forms:

- arts-core: people who are drawn to a destination because of the arts;
- arts-peripheral: people who are drawn to a destination largely for a non-arts reason but who do visit the arts and/or for whom arts may have had some influence on the decision to visit.

Many inland towns and cities have also become tourist destinations and have experienced a similar temporary population rise and demand for entertainment that may differ from that demanded by local residents. Many cities have experienced tourism that arises from their 'built heritage' such as churches, cathedrals, castles, palaces, monasteries, civic buildings, houses, warehouses, bridges, town walls and entire 'urban ensembles', and from a heritage (whether their own or someone else's) presented in museums and art galleries. Tourists drawn by the heritage element of urban culture have also created a demand for the performing arts and entertainment - as a secondary activity. Heritage has been at the core of the visit and the arts at the periphery. It is, nonetheless, also the case that in some places (both coastal and inland) visitors have been drawn solely because of the arts. The arts have been at the core of the visit for some visitors. This may arise for many reasons:

- the arts are not universally provided so that travel may be necessary if performances are to be seen at all;
- a desire to experience a performance or performer of a higher standard than might be available at home;
- a desire to experience a production or performer that is rarely seen at all anywhere;
- a desire for 'an experience' that is not available at home; this could be a combination of arts performers and performances in a festival form;
- 'an experience' can also apply in a less organized form to the availability of the arts (perhaps also available at home) but in a different, more 'pleasant' environment. That environment might be a coastal holiday resort with a holiday atmosphere and providing other distractions. It might also be a heritage town or city not only creating a particular atmosphere but also providing the opportunity to visit heritage attractions.

It is appropriate at this stage to determine if there is justification for believing that the arts do, in fact, draw non-local audiences. Subsequently the issue of whether or not non-local audiences have a positive effect on regeneration will be examined.

The arts and non-local audiences

There is only limited and mixed evidence for whether the arts draw non-local, staying visitors to audiences:

- at one extreme, it would appear that Broadway (New York) and the West End (London) do succeed in attracting non-local audiences. There are undoubtedly high proportions of tourists in theatre and concert hall audiences but it is not too clear how many were in New York or London solely because of the arts. For most, other reasons (including seeing heritage) were more important. Nonetheless the arts were an important secondary attraction for these though there are clearly a number of 'arts-core' tourists as well. The attractions of New York or London for tourists are many and varied and, in both cases, the arts provision is extensive, diverse and spatially concentrated; they are special cases. The arts provision would undoubtedly be at a high level regardless of the

- tourist demand but this latter has led to concern about tourist spectacle swamping more meaningful artistic activity;
- outside these major tourist centres, there is some evidence to suggest that for visitors to certain seaside resorts in the UK, one of the main reasons for holiday-makers being there is the entertainment offered. Some resorts are major entertainment providers during the summer season and this is influential in consumer choice decisions. It has almost become a tradition for holiday-makers to go to see shows at seaside resorts. For some visitors it is an opportunity to see shows and performers they would not otherwise see and, for others, it is simply part of the overall holiday experience and something to do in the evenings;
- other arts events that are successful in attracting tourists include festivals such as those at Edinburgh or Glastonbury (UK). Festivals are often particularly distinctive in that they combine a number of performers and performances in one place over a concentrated period of time. Tours by pop and rock stars also attract audiences from a wide catchment area. The desire to minimise the number of performances but maximise audiences draws such musicians to a circuit of large event arenas or sports stadia.

Overall, there is support for the view that the arts can attract non-local audiences. This is most likely where the productions are distinctive in whatever form and therefore travel is worthwhile (see above).

Otherwise, the influence of theatre and music is felt most strongly through their joint effect with other tourist resources such as heritage or sun and sea.

Non-local audiences and regeneration

It is to be expected that non-local audiences will bring a number of direct positive effects such as revenue and employment. Their expenditure is usually a net injection into an economy and this, in turn, will stimulate the supply and feeder activities with corresponding diffusion of benefits: the multiplier effect. This effect is, though, difficult to estimate and is frequently misinterpreted and misunderstood.

Less direct effects include:

- using theatre and music may influence the image of a place in such a way that inward investment is stimulated. The role of the arts in making a town or city an attractive place to live and work is emphasized by many. The process of developing and the successful achievement of cultural tourism in a town or city may also create perceptions of a place where 'things happen', 'things get done' and of a place that 'has taken its place as a major cultural centre', almost regardless of what is being produced or performed. These effects are, however, difficult to demonstrate; awareness of a place may be raised but it seems that inward investment is more heavily influenced by more mercenary matters;
- a sense of satisfaction and pride may result among locals as a consequence of the generation of an exalted image and this may be sufficient 'reward'. This too may, in some way, lead to improved productivity and output.

As a form of tourism it is often considered to be particularly desirable. It is believed to be a new and expanding market made up of high-spending and up-market consumers. It is less dependent upon the weather than is seaside tourism and so can be a year-round activity.

The relationship between the arts and tourism has been frequently criticized however:

- the cases of Broadway and the West End are obviously not typical nor ones of deliberate strategies by local government or tourist boards to develop tourist audiences but they do highlight some of the relevant issues. In both cases there are continuing comments about the arts having become mere tourist spectacle. Productions that are aimed at tourist audiences are typically safe and prestigious. New, indigenous and adventurous cultural activities are squeezed out by the ability of entrepreneurs to monopolize performance space for long runs of musicals, in particular. These can be marketed to a tourist audience that is constantly renewing and they have an attraction to both domestic and international markets;
- other forms of artistic activity aimed at a tourist audience have also received criticism. Some internationally renowned festivals, the European City of Culture programme and the policies of local and regional government to develop cultural and artistic life have, it is argued, focused on prestige projects and 'flagship' schemes at the expense of community-based schemes and of widening local access to the arts. In particular, it is suggested that local relevance and talent and the nurturing of long-term cultural development have been neglected and the emphasis has been on the high arts and prestige projects;
- the desire to attract tourist audiences may be one reason why cities invest in new cultural facilities such as theatres, concert halls and event arenas. Some of this may have been ill-judged in that costs and benefits were inadequately assessed beforehand. 'Civic boosterism' has supplanted more rational assessment;
- there has been the occasional argument too that finance used for such cultural facilities and events could have been better used in meeting other social or economic needs. This is not just a matter of priorities but also of the best way of meeting certain objectives. The interests of an educated cultured bourgeois or service class nonetheless seem to take precedence over the interests of others in most societies;
- residents of arts-tourist towns and cities frequently find little relevance in a product ostensibly developed for and aimed at others: non-locals. Although there is often local involvement in the initial stages of festivals this disappears and local residents feel alienated. Residents may appreciate, nonetheless, that there may be economic benefit from such events and they may feel a certain amount of civic pride but the festival is perceived to be elitist and divisive.

Conclusions and implications

There is little doubt that tourists can be attracted by theatre and music. This may be because the arts are at the core of the visit or it may be that they are peripheral and incidental to some other reason. People will travel to see the arts if the product has sufficient drawing power. In a different way, for people away from home primarily for other reasons, whether that be holiday, business and conference or visiting friends and relatives, the arts may be influential in the decision-making process. The availability of the arts may be significant in deciding to visit a coastal resort or city. The success of a holiday destination initially based on sea (and perhaps sun also) or of a conference town or city may depend on the adequate provision of arts in the form of entertainment that is diversionary and 'light'. Promoting such 'products' will require different strategies. For the lover of the arts (whether that be of the high arts or of lighter entertainment and pop or rock) direct promotion of the arts, though within the context of the location, may be sufficient through media, direct-sell techniques and through contact with the travel trade. For others, promotion of the destination itself may be a first requisite.

To attract arts-core tourists, the arts need to be 'distinctive':

- they should be unique in not being available elsewhere in the form of the production, the performers or the quality. The sheer variety and spatial concentration of productions in many large cities is an attraction in itself. The distinctiveness can also lie outside the arts and lie in the environment. This may be attractive for many reasons including location, scenery, weather, the built (usually historic) environment and links with local culture, composers and performers. Artistic productions and performers that are accessible elsewhere may nonetheless be particularly successful in distinctive locations. Festivals have a particular attraction of 'mass' and convenience; the more successful are held in attractive places often already associated with tourism;
- the more convenient it is for potential audiences to purchase the product then the more likely it is that the purchase will occur. The packaging of the arts into all-inclusive holidays may be especially successful in attracting long-distance visitors. Such packages may also include visits to other non-arts attractions;
- it is vital that supporting infrastructure is in place. Ambitious plans have been less successful than envisaged because of inadequate hotel accommodation or restaurants and bars or because of poor internal public transport and taxi services. Some of the more successful have been those that have been able to offer the opportunity to engage in other activities including walking, seeing historic buildings and sites as well as sun-worshipping on beaches.

There are a few issues of caution to note:

- in terms of consumer demand there may be a danger of market saturation. Festivals, in particular, were one of the great growth industries of the late twentieth century. They often have novelty value but continuing interest has been difficult to maintain;
- the regeneration aspect of using the arts to generate tourism is difficult to demonstrate. Tourism itself, whether based on arts or heritage, on sun and sand or on conferences, has not noticeably been the most satisfactory solution to economic decline. Even at its most successful, it is commonly a low-income,

- seasonal and volatile activity subject to many external influences on consumer demand. It may be that the comparative advantage of many places does lie in tourism but this should not detract from its faults;
- the incorporation of the arts into tourism strategies raises many additional issues including the meaning and significance of the arts. The fear is that the arts become mere tourist spectacle and become stifled and demeaned. Usage of the arts requires a careful balance between artistic and commercial considerations;
- local relevance and benefit may also be sacrificed. It becomes incumbent therefore on those responsible for arts-tourism to endeavour to ensure that it is locally relevant or at least to engage in public relations exercises to convince local residents of the benefits;
- claims about the economic benefits of arts-related tourism can be readily identified. This is not an easy task to calculate and many inaccurate and misleading studies exist. It is relatively easy to determine expenditure of tourists but the wider 'ripples' of that are particularly problematic to trace. The influence on 'image' and subsequently on inward investment is also very difficult to estimate.

In all, the influence of theatre and music in attracting tourists and thus in assisting regeneration is complex and raises issues that may be rather more fundamental than those that apply in other aspects of tourism. Many of the issues have, however, been raised in the case of heritage tourism; there is a recognition that history has been commodified into heritage and the heritage that is presented is very much a reflection of underlying values and power. There may be no easy solution to satisfactorily reconciling tourism with history and the arts but, at the least, it is necessary to expose, recognize and explore the issues. The arts are too important to treat as just another industry or tourist resource and they require sympathetic consideration from all who deal with them or seek to gain financial benefit from them.

Note. There is a further discussion of arguments and evidence presented here in: Hughes, H. (2000). *Arts, entertainment and tourism*. Butterworth-Heinemann.

The Place of Textile in Cultural Tourism

Roland Delbaere

Why textile? What does textile have to do with culture? Though it seems strange at first sight to weave 'culture', 'textile' and 'tourism' into a common patchwork it is hoped that this paper can show that textile can be an interesting addition to cultural tourism. The aim of this paper will be double: first to give a brief survey of the UNESCO and European programmes in which textile is the key-word and, second, to single out the best examples of successful realizations in the field. The second part of the paper will attempt to provide a few methodological suggestions for the practical organization of a textile trail with possible extensions to other key-words like wood, stone, iron or water leading to other tracks of key-places.

Textile was the key-word for one of the most spectacular programmes of the UNESCO cultural decade 1987-1997 - *The Silk Road Programme*. As director of the computerized database in leisure, recreation and tourism LORETO, I had the opportunity to attend a part of the programme and to write and index the abstracts of the papers read at more than twenty-five UNESCO conferences organized along the various desert, mountain and maritime tracks of this 'East-West dialogue route'.

The Council of Europe was soon to follow suit with its famous 'Cultural itineraries', a programme which, for the past three years, has had its own Institute in the City of Luxemburg. It included a European silk road programme. Although the maps of the UNESCO silk roads have been widely diffused through a number of publications and TV programmes, the dozen European silk roads promoted by the Council of Europe are less known despite considerable research and network activity. Since 1994 at the Budapest Congress, the European silk road programme was extended to other textiles. Silk is indeed less widely spread than, say, wool or linen in northern and eastern Europe, so that other 'textile roads' based on the model of the Mediterranean 'silk roads' began to be investigated in an increasing number of European countries.

This first wave of textile roads led the European Commission to fund the ETN (European Textile Network) within the framework of its Raphaël programme (1999-2001), so that it could create the NET Cultural Foundation based in Brussels with an Internet coordination centre in Hanover. The above-mentioned initiatives of both UNESCO and the Council of Europe, and the possibility to obtain funding from the European Commission have resulted in a greater awareness of the potentialities of textile for cultural tourism and the sustainable development that goes with it. More than fifteen European countries or Euro-regions now have their own maps combined with museum files and artist references. Spain,

Italy, France, Belgium, The Netherlands, the UK, Bulgaria, Romania, Greece (particularly Crete), Turkey, Georgia, Ukraine, Russia, Finland organized conferences and seminars in which places of textile memory were linked with living textile centres (museums, industries, handicraft, artist workshops, etc.).

Besides leading to a renewed interest in the sector, the hosting of a conference or seminar on textile can also have significant repercussions on the economy of the region by involving industries in cultural tourism, encouraging new ideas for the restoration of textile areas, localizing or discovering innovative centres or high-tech development spots and creating new jobs for regional development. Another asset is international awareness and transnational cooperation, linking the networks of bordering countries like for instance the Greek network centred in Soufli near the Turkish border with the Bulgarian and the Romanian silk roads.



Figure 1 Silk museum at Soufli, Greece

A textile route project is more likely to be successful if it involves local industry. This is the case with the Turkish textile route where the visit of historical heritage (the caravanserais) is combined with that of silkworm farms and factories where you can buy not only silk but also local linen or leather products.

Textile tourism research is facilitated by the recent developments of international communication tools. Electronic mail and Internet communication make it easier to exchange numeric information, computerized mapping, image database material, design patterns, technological heritage know-how, artist and crafts indexes and information on forthcoming textile or other cultural events. Contacts with academic and/or museum research on those topics

can be structured in a regional or national official observatory linked with European textile networks, research in-put centres and tourism development administration with media follow-up.

A few significant examples follow:

- The Terrassa Museo Textil near Barcelona where the curator Eulalia Morral is promoting the concept of 'demuseification', thus turning the past towards the future. The Terrassa Museum owns a prestigious collection of ancient patrimonial textiles and textile designs. A numeric image data base - IMATEX has been indexing these treasures for three or four years. The neighbouring textile engineering high school is encouraged to re-use old patrimonial textile designs and to cross-fertilize them with modern high-tech computer-assisted design and textile production. This has yielded excellent results: improvement of Catalonian fashion models and fashion shows and higher export rates. The Arqueotex Network, a pilot programme of the European Commission (FEDER) has created partnerships with a similar bank in progress at the Textile and Decorative Arts Museum of Lyon, using the same software as that of Terrassa.
- Contacts have been made to transfer the image database know-how to the recently renovated Musée d'Art et d'Industrie of Saint-Etienne where an impressive collection of one and a half million ribbon designs (Saint-Etienne has always specialized in small textiles) is waiting for a new life. Nadine Besse, its curator, is also video-recording the technological know-how of retired ribbon textile workers, giving it a pedagogical orientation so that it can serve as a tool for future tourist guides in the field. The interest of archeo-industrial tourism is indeed to offer 'working machinery' to the prospective visitors and to spin off new jobs on old knowledge. When well-structured archeo-industrial networks cooperate with, or complement, living industrial textile networks like ACTE (the Association of European Textile Collectivities), the main factors for the re-development of the sector are put in place. Schools visiting such sites rebuild cultural identity on recent economic developments while representing an important local potential market. It can also restore local pride in economically depressed areas and offer a positive antidote to the sense of psychological and social loss usually experienced after industrial de-localizations.
- The city of Manchester reconstructing a kind of archeo-industrial Venice in its very 'Cottonopolis' city centre can be regarded as a model of the renewal of local cultural identities with renovation of ancient mill buildings, canals, re-conversion of an old railway station, promotion of water tourism, implantation of new cultural plants, cybercafés, etc. Since the early 1950s, the textile industry, with easily transferable technology and machinery, has been one of the first perceptible examples of globalization with its de-localization to low-waged and socially non-organized overpopulated regions with high rates of child work and unprotected unemployment (as was the case in our own western European countries 100 years ago). It appears from a study published in the early 1990s that the cost of work in the textile sector is six times lower in Morocco than in western Europe, which is still nothing compared to Sri Lanka (eighteen times lower) and worse still to China (thirty times lower!).

- Organized and well-equipped countries have reacted with new robotized technology, chemical research into new fibres, new high-tech, computer-assisted production and innovative design conception. Advanced textile industry has succeeded in developing new carefully targeted markets that can be taken into consideration for cultural tourism, including futurist textile architecture. In Strasbourg for instance one hundred and forty twelve-metre-long buses as well as public transport tools spend the night under a huge textile roof held by a steel and cable structure (6,700 square meters) and completed in three weeks. Textile architecture, ten times cheaper than hard-wall-and-roof buildings, can be the starting point of new landmark features in the existing landscapes or cityscapes. This is the case with the restoration, by means of new high-tech fabrics, of the old Mediterranean windmills around the extension of the Palma de Mallorca airport and of the beautiful textile building at the entrance of the renovated Puerto Madero in Buenos Aires. Provisional textile bridges can be highly symbolic in their attempt to resume links between communities after the destruction of a common heritage in armed conflicts. Such effort towards reconciliation can alert international opinion and generate funding for the reconstruction of the original model.

These examples clearly show that it is useful and indeed indispensable to consider the follow-up of innovative technological centres and networks when setting up cultural routes. Frankfurt am Main with its annual International Trade Fair for Technical Textiles (and non-wovens) - *TECHTEXTIL Messe* - is probably the best place to go for information in that field. Lyon in France is another such place.

Neither can textile art be ignored when building a textile route. Artists are living monuments who deserve to be known and promoted in tourism trails and events. Promotion of arts and crafts is particularly strong in the Cretan textile routes. The case of this Greek island, dependant on air-carried tourism income and rich in culture and textile crafts, offers a perfect case study to examine the economic approach to the textile routes. The Cretan textile routes (centred in the town of Rethymmo) were part of the EUROTEX European network project which included also Alto Minho (Portugal) and Lapland (Finland) and was supervised by a Dutch team centred in Tilburg. A SWOT analysis and a rigorous market analysis including an examination of language skills, marketing techniques, technological improvement and a common promotional network preceded the implementation of the programme. The ideas expressed by Katerina Tzanakaki in the Cretan EUROTEX survey link up with the recommendations of other textile road developers like Stephen Sheard who uses the recommendations of Riddell Graham for his own 'Wool and Wonders of Scotland' textile trail:

- excellent rural hotels with character;
- good table service;
- privileged access to textile collections in museums with expert guides (tradition and heritage);
- possibility to meet artists in their workshops and to exchange ideas with them;
- possibility to buy local products not available in normal markets;
- possibility to link textile tourism with wider aspects of cultural tourism (landscape, history, arts and architecture, heritage, art festivals, folklore);

- possibility to travel in small flexible groups with people sharing similar interests;
- possibility to visit living textile manufacturers or industries;
- necessity to produce and provide top-class information material for tour operators and tourism promotion systems, including maps, multilingual resource persons and tour organizers.

With the events of recent years, the situation of Dubrovnik, surrounded as it is by political tensions, has become almost as insular as that of Crete. An insular or peninsular re-development axis could therefore be imagined between that town and Split, an axis that would include the string of splendid surrounding islands like for instance Korčula, a link with the silk road and a landmark on the Marco Polo trail (note that the Turkish tourism silk map does mention the silk route of Marco Polo whose birth house is on the Island of Korčula). In her notes on the history of silk in Bulgaria Dr D. Bogomilova mentions Dubrovnik as a privileged spot at the crossroads between the Mediterranean and the Danube countries with Bulgarian tax-exemption for Dubrovnik tradesmen crossing over to Vidin on the Danube. More to the west, Slovenia participates in the recent ETN-NET through its contact point in the Slovene Ethnographic Museum of Ljubljana. It also follows 'Linen on Net', another European textile network. Very famous textiles more than a millennium old were on display at the 2001 spring exhibition in Split devoted to Carolus Magnus.

The example of textile routes as niche markets or as case studies for cultural tourism can be integrated in the widest possible sustainable development programme. This programme should include:

- the localization of local heritage, arts and crafts, contemporary design and architecture, festivals and other events;
- international links with similar routes, experiences and knowledge structures via academic/museographic research, conferences and other opportunities;
- computerized storage of data easily accessible and with up-to-date numeric technology in a recognized cultural observatory organized on the basis of a flexible thesaurus;
- increased interactivity between the different cultural fields, the available mobility vectors (carriers) and the accommodation organizations;
- increased interactivity between observatories, research groups and media popularization;
- creation of audio-visual guides (videos, CD-roms) of the routes by professionals, with good geographical information included in the global programme;
- creation of multilingual brochures on the above-mentioned input devised by professional graphic designers;
- creation of logos, labels and landmarks ensuring a physical and aesthetic presence of the route in the real land- and cityscapes;
- devising of school and TV games to promote the route with touring prizes for the winners;

- regular SWOT analysis of the programme with feedback corrections when needed.

The 'Routes des Arts de la Maison' in southern Provence is a good example of a textile route developing into what has become an 'Art of Living in Provence'. Starting with a forty-page brochure on a textile route (weavers, museums, textile shops, crafts) it extends to other routes in the region: wood, ceramics, iron, stone, antiques, castles and architecture, 'gîtes de charme', crafts, markets and key-contacts). The little town of l'Isle sur Sorgue in French Provence has seen its prosperity increase thanks to these different routes and their development programme.

Enlarging the system with other key-words can indeed open up new menus. The Belgian OPT (Office pour la Promotion du Tourisme) devoted the year 2000 to the promotion of another of the European Cultural Itineraries: Parks and Gardens. The programme, promoting 150 prestigious gardens throughout the country, was extremely successful and attracted a lot of visitors. This encouraged the OPT to enlarge it to other items. Thus water in all its aspects, from blue gold for life or tourism, to energy-producing force or recreational use, will be one of its forthcoming programmes, followed by ... *textile*.

A tourism observatory is gradually taking shape in French Belgium. Besides the classical WTO follow-up of spent nights and frequentation rates in or around different sites, the thematic approach through different key-words mixed with GIS maps of key-places can progressively become a resource centre and a database programme for tourism and, by extension, for innovative regional development. It was important to draw attention to the need to include in such research a technical index card for each museum or interest centre mentioning not only the usual items (themes, collections, contacts, guides, opening hours etc.) but also:

- the access possibilities for normal individuals, schools, groups, disabled people, the distance from bus stop, railway station, highway gates etc.;
- the parking possibilities (paying? free?) for individual cars and buses;
- the available meeting rooms (conferences, symposia) and their equipment;
- the existence of a museum restaurant, museum shop, cafeteria or tea-room;
- the nearby accommodation and restaurant possibilities (foresee a loose leaf added to the fixed leaflet to provide for changing information);
- language facilities and information provision in each location but with links to the neighbouring places on the trail (even when trans-regional);
- a glossary with technical terms when needed.

Textile can combine with other arts and crafts itineraries as was experienced with great success in Provence. Textile trails can be partly based on heritage and partly on recreation, sometimes initiating new open-air activities (crossing of rivers on textile bridges or the organization of kite festivals). Textile is as indispensable as music in folklore and regional identity festivities. We are convinced that it is a most interesting sector to start a thematic computerized information system and to serve as a basis for a cultural tourism development programme. As the first extension of our skin, textile occupies an important place in our daily life. It can also become a new key to read the heritage of town and landscape, since a new viewpoint is always stimulating.

Cultural Tourism and Culinary Heritage

Christina Quijano-Caballero

Cuisine, in all its manifestations, is an important part of cultural heritage. Focusing on countries in transition, this paper aims to make the most of culinary heritage in developing urban tourism policies.

The origins of cuisine, as we know it today, and the food that we find on our supermarket shelves, can be traced in parallel to the history of civilization. The nomads of prehistoric times, migrating from place to place seeking greener pastures gathering food, took some time before they settled in one place. As agriculture was developed and food essentials such as salt were exploited and traded, stable communities and the means for developing culture, as we know it, were established. The first trade routes were opened up along which other goods and people travelled. The Greek invasions into the near east, the expansion of the Persian Empire and the opening of the silk and spice routes to Asia, Arab traders, the expansion of the Roman Empire as far as Britain establishing its defence limits along the Danube from the Black Forest to the Black Sea, as well as the voyages of pilgrims and the Crusaders, the discovery of the New World, the development of European trade and colonization, how could these fail to be the impetus for important exchange of food items and culinary innovations, even if these were not the original purpose of the campaigns or voyages? Over these centuries of development of civilization people became more interested in diversifying their diet, and trade in goods originally important for the economy, such as spices, exotic fruits and vegetables, even sugar, became commonplace. We tend to forget in Europe, for example, that oranges, peaches, apricots were originally cultivated in Asia, while potatoes, tomatoes, capsicum peppers, came from Central and South America. As new products and new ideas were introduced, a new type of traveller was born - the modern pilgrims, and with them a new industry. The reasons for their travel are getting more and more difficult to define but today we have come full circle with the tourist becoming once again an investigative traveller seeking greener pastures, often to escape from the everyday routine of their lives, or especially in western Europe, a healthier and simpler lifestyle, albeit for short periods of time.

This is briefly our culinary heritage and as such food and its diverse methods of preparation are to be considered as part of our cultural heritage. After all, the origins of the word 'culture' are from Latin - colo, colere - meaning to cultivate, grow or till, which means working on the land and producing crops. It is, therefore, quite difficult to understand why in discussions concerning culture today there is often no more than a passing reference to cuisine.

Food is part of the living, ongoing culture of peoples, both tangible and intangible. It concerns their past, present and future. Cuisine, food and its preparation, identifies a nation's or community's culture telling us about its origins, its character, its religious and social activities, even its language. In all societies creative cooking has played an important role in making the most of limited resources, in simple everyday life, even during famines and wars, as well as in religious or secular celebrations, in fasting and feasting, rituals, family gatherings and other social activities and seasonal celebrations.

Not only is cuisine, often referred to as the higher, skilled, creative manifestation of cooking, an art in its own right, but it has also proved to be an inspiration, and indeed a necessity, in developing other aspects of culture. Food items and articles connected with food preparation and conservation were among the first cultural goods to be exchanged. Many of these we consider to be important items of our cultural heritage - from basic implements and simple pottery for transporting oil or wine, to beautiful ceramics, precious metals and fine porcelain. They are displayed in our museums but the visitor is not often inspired to consider what artistic dishes were served in them. It is not by chance for instance that the Chinese considered that their apparently simple yet sophisticated cuisine had to be served on beautiful porcelain.

Food has always been an inspiration to artists, not only for its important role in their nourishment, but as subject matter. From the frescoes of antiquity to the canvases of the Dutch Masters, to the Impressionists, we wonder at the artistic talent but are also provided with a historical account of foods that were available and of contemporary eating traditions. They are often included in exhibitions devoted to the history of food and cuisine along with other documentation such as cookbooks. Cookbooks were among the first books to be written and they tell us much about our history, both social and scientific, often written by medical doctors, such as Appicus, Anthimus, Platina. Certainly today the shelves of book-shops, libraries and newsstands are filling up with books and journals, covering new research and translations, which give us an insight into eating traditions in prehistoric times and from the great civilizations of Egypt, Mesopotamia, Greece and Rome, to the rituals of the Middle Ages. Combining history and geography with cooking, many of today's cookbooks give not only recipes but make interesting reading, and 'back to basics' food preparation for beginners, as well as innovative approaches, rival with novels as best sellers, not to mention television and the Internet where whole channels and numerous sites are devoted to food programmes. Even music accompanies food preparation: Mozart concertos or Rossini arias accompany videos or books of famous chefs illustrating their art. Cuisine is like any other aspect of culture.

So where does all of this lead us in the discussions concerning the development of culture as a driving force in tourism in the urban setting, with particular reference to the countries in transition? As it has been pointed out, cuisine in all its manifestations is a part of the cultural landscape of peoples and as such justly deserves to be preserved along with monuments and artefacts, but at the same time economic pressure and globalization trends make it increasingly difficult to preserve a country's culinary heritage. The question is how to ensure that food is part of the tourists' cultural experience, and that it makes a positive contribution to the economy, while at the same time taking into account the need for a sustainable tourism which benefits both the tourist and the local population.

There is no question that tourism, at present, is of economic benefit to all countries, developed or developing, and indeed can breathe new life into urban areas, but how can we limit the negative effects of mass tourism and exploit the positive effects of cultural tourism?

Approaching the aspect of cuisine in cultural/urban tourism in the countries in transition there are similar dilemmas to those faced in exhibiting other aspects of cultural heritage be they architecture, works of art, music, literature. Namely whose heritage are we talking about; do people want to preserve or conserve or are they only too anxious to leave the past behind; for whom is this tourism and what are their expectations; is sustainable tourism a viable option and if so what will be the effects on the local population and the environment?

A country, a region or even a small community may have its own special cuisine which identifies its characteristics and cultural heritage often more precisely than any other feature. This may be determined by ethnic origins, by geography or by other outside influences. Many of the countries in transition although previously considered one, with centralized economies, managed to keep some cultural identity, but are now re-examining their history. They have to choose which features they wish to preserve or revive. It may prove difficult at a time when western style is a sign of openness, but at a time of rapid change it is often reassuring to maintain certain identifying characteristics. When many other aspects of culture are suppressed or forgotten, food is often the only bridge to the past and during this period of democratization when much state support for culture, the arts, music and literature has been cut, cuisine may provide a certain continuity. Not that this should prevent diversity or imaginative adaptation. It's just a question of how to give value to the past while at the same time moving consciously into the future.

If we look at other countries in Europe over recent years we see a return to traditional dishes, after many experiments, particularly 'nouvelle cuisine'. Even in France the chefs of the old school, the representatives of 'haute cuisine', are returning to their roots and using local ingredients which distinguish the cuisine of different regions. In Italy, for instance, where despite an invasion of all different types of cuisine and a fusion, or confusion, between the pasta and pizza eaters of the south and the rice and polenta eaters of the north, regional food has survived and is undergoing a revival. These were probably reactions at the *fin du siecle* when people felt a nostalgia for the past and were searching for their identity, which they, interestingly, felt they could find in food.

So at this time of renewal in the countries in transition, there is definitely no reason to abandon the traditional food of a region replacing it with western style fast foods, or common foods 'from home' that were, and still are in many places, one of the signs of mass tourism. It might be necessary to adapt and modernize some dishes to suit present-day taste and health concerns, but this should be an evolution combining the old with the new, highlighting the essential characteristics of the local cuisine. Although local people may not wish, or be able, to spend money in restaurants on food that their grandmothers have been making for years, the tourists of today are more adventurous and will ask for local specialities. They seek new stimulation on their vacations - what better way than through food. They take home new ideas, which is good publicity and may even create demand for food imports in their home countries. The cultural tourist is, more often than not, well travelled and sophisticated and will demand **value for money. If tourists are treated like guests at one's own table, made to feel welcome and comfortable, they will return home feeling satisfied and relaxed, with lasting memories, which after all are the main components of a successful vacation.**

With these points in mind we have to consider who the guests are and what their requirements are. Urban tourists today have varying and new characteristics due to changing demographic and economic factors. The working week is getting shorter and holidays longer and travel offers are continually changing. Present day tourists are increasingly like the traveller of old, preferring to make their own travel arrangements and booking accommodation,

all made possible by the development of Internet facilities. Differing age groups will have differing characteristics and expectations, and will require different provisions as far as food is concerned, whether in restaurants, hotels, cafés and bars, even museums. Although this may sound daunting, with some intelligent management there is no reason that these arrangements should not be mutually supporting and the facilities provided exploited to the full, both for the tourist and the local population.

In developing the culinary attractions of a city, a common policy is needed involving, at the local level - the community, both town planners and restaurant and café owners, chefs and staff. Local and regional associations and societies are one way of bringing them together to discuss their culinary heritage and what dishes to serve that will best illustrate and promote this heritage. At the same time they should be keeping in mind the needs of local residents, making sure that their daily requirements, both in and out of the tourist season, are taken into account. A small town centre, for instance, should not be deprived of its local bar, baker, butcher, corner shop either to make way for more tourist restaurants only open at certain times of the year, leaving a ghost town out of season, or for supermarkets where the food will be more expensive. The residents' tranquility, especially at night must also be respected - it is a good idea to make restaurant areas pedestrian zones in the evenings during the high season. In the end, **it is the tourist who should fit into the town peoples' way of life, not vice versa.**

The modern tourist is much more environmentally aware. Maybe one thing people will have learnt from the recent BSE and foot and mouth crises, in western Europe, is that one has to pay for quality and care. Interestingly, figures show that the percentage of the family budget spent on food has dropped drastically in recent years - from thirty per cent to ten per cent in the UK and from fifty per cent to fifteen per cent in France. Additionally, one of the joys of present day travel may be to escape these food problems, as well as the sterile pre-packaged food on the supermarket shelves. People are also becoming more conscious of eating healthily. It is therefore an opportune time to promote and emphasize the use of natural unpolluted products, of cereals, fish and vegetables, olive oil, that are basic to central and eastern European cuisines. **Food should be locally produced as far as possible in order to support and stimulate the local economy and farming to the benefit of both visitor and resident population.** Also food often tastes better where it is grown. This is one area where the countries in transition can learn from the mistakes of the West where, in the quest for cheaper foods, there has been a drastic move from local production of fruit and vegetables and much land lies fallow.

Developing food as a cultural attraction can even relieve pressure on other cultural attractions. We are seeing the development of markets in the West as eating places, either informally at the market stand, or in simple bars or cafés depending on the type of market, copying in a way the traditional street food on offer in many developing countries. The typical simple dishes and snacks on offer are all popular with the tourists who otherwise would maybe not venture into the market, which is, after all, an interesting cultural experience. In this connection food and local crafts as souvenirs also deserve examination, as well and attractive locally-packaged items such as spices, oils and other goods native to the cuisine of an area, along with recipe booklets, can be of interest, either on offer at markets or shops, or at the points of travel departure.

Everyday food shopping can also be part of an urban holiday (city tourism), if the tourist rents a self-catering apartment. Already popular in countryside and seaside areas this system is now taking off in some cities, with booking possible on the Internet and through local agents. This is particularly interesting for families with children, but also for those who would like to experiment with local food, even for a long weekend.

Local, as well as national and international gastronomic fairs and festivals are attractive and an excellent way to familiarize the consumer/tourist with foods, their preparation and traditions. Trade and cultural missions abroad can exploit the culinary attractions of the country as an effective promotional tool.

The present trend towards active holidays can also be accommodated through cuisine with the promotion of cookery courses and schools, which can provide a welcome boost to lesser known towns and areas. They can be made even more attractive and interesting if combined with visits, for example, to recently restored buildings of historical interest, and to cultural events, or if included as part of a fitness/wellness vacation.

These are just ideas, which of course can be expanded on in the light of the discussions at this seminar. I have tried to confine my comments to urban tourism, which may be successful in exploiting cuisine in the development of tourism. But whatever policy is adopted, one of the most important aspects, as in all types of tourism, is promotion. Food and cuisine have proved to be a successful way to expose a country's attractions, whether the campaign be in the visual or the written media. Television programmes addressing history or geography, or travel documentaries, are an ideal medium for including information about the food of an area. Likewise magazines, either completely devoted to food, or to food and travel, of which there are increasing numbers, or more general publications, even the travel and food sections of weekend editions of national newspapers, can offer attractive showplaces for displaying the food and traditions of a country or region. However, a concerted effort has to be made to target and provide journalists with information, recipes and photographs.

A country's culinary heritage is a vital and attractive element of its cultural heritage, to be preserved and promoted in all its diversity and, as such, if positively exploited, it can contribute greatly to the development of successful tourism in the countries in transition at this point in time.

Some Questions on the Restoration and Revitalization of Historical Sites Using Dubrovnik as a Case Study

Vjekoslav Vierda

Historical sites have features that determine 'a priori' the framework of each kind of activity that occurs either in or around the site. This also applies to the management of buildings that are included within this historical perimeter. Above all, becoming involved with anything inside the historical area implies an involvement with the Institute for the Conservation of Monuments. This results in all kinds of limitations that in turn lead to complicated procedures. The final outcome is that the process has to be extended both spatially and time-wise. As a rule, it means that everything becomes more expensive than with the same operations carried out on buildings with no monumental significance. At the same time, such processes affect the public in a special way. The proprietors/users of buildings in the historical area attempt to capitalize on their property in any way possible. All others, including professionals, offer critical commentaries on any activity going on. Unfortunately, this usually comes down to how or what should be done, even though they are not usually ready to take on even minimal responsibility for the solutions offered.

This can all be applied to the historical site of Dubrovnik. In addition, there are other aggravating circumstances that should be added. For instance, the fact that we are dealing with a dynamic site that houses 4,000 people, and in which at least twice that number either enter or exit on a daily basis, whether for the purposes of business, shopping, church, cinema, theatre, or just for strolling on the Stradun, the main street. Further, tourist peaks sometimes either triple or quadruple this number. Simultaneously, the historical site of Dubrovnik is also the political seat of the city and the county, a cultural centre, and the most concentrated tourist supply area. The historical component should also be included as well. At this moment of writing, there are various processes at work: denationalization and privatization, return of property, housing purchases, and the restoration of the homeland war damages to Dubrovnik.

When we talk about the historical site of Dubrovnik, we are speaking of that part of Dubrovnik that is included on the UNESCO World Heritage List. It includes the city walls and all that is contained within these walls, also covering the contact zones of Pile and Ploče. Primarily, it is viewed as a first class monument that is listed in the registry of cultural monuments. As such, it is subject to conservation under the terms of the Law on the Conservation of Cultural Resources (Official Gazette No. 69/99). However, besides regulations that regulate conservation issues, the legal status of certain historical areas in Dubrovnik varies. For instance, the old city harbour is both a monument and an internationally important harbour.

However, in spite of this, it can be said that the historical site of Dubrovnik falls under a conservation regime that is equally valid for all other such monuments in the country and that there is no question of any special treatment here. Nonetheless, it should be mentioned that it was not always so. A certain regime ruled up until 1991, whereby the Institute for the Conservation of Cultural Monuments in Dubrovnik had no authority over the treatment of restoration projects. All the recommendations and decisions made by the committee of experts at the time had to be verified by a state institute. This practice was criticized most strongly by conservationists, such that the authority to make decisions on reconstruction projects was given back to the local conservationists. However, in our opinion, this was not followed through to the end. As a result, an advisory committee was retained that only made advisory and not executive decisions - in short, those without commitment. On this basis, a situation was created whereby the conservationists used this committee as an alibi for certain decisions. On the other hand, committee members did not take on the responsibility for wrong or inadequately conceived proposals, justifying themselves by saying that the suggestions, if accepted, were the responsibility of the person involved.

Restoration, contrary to conservation, has been specific of Dubrovnik since 1979. Basically, there was a need to establish a permanent organizational system for the financing and restoration of the historical site of Dubrovnik. Especially since its inclusion on the UNESCO World Heritage List in 1979, which coincided with the earthquake that struck Dubrovnik during Easter of that same year. This resulted in the passing of the Law on the Restoration of the Endangered Historical Site of Dubrovnik, which is still in power today, even after numerous changes and additions (the Law on Changes and Additions to the Law on the Restoration of the Endangered Historical Site of Dubrovnik, Official Gazette No. 128/99). It would appear that besides the official reasons for carrying out this law, the historical context within which the law was made should also be considered. We are dealing with a time when Dubrovnik was a sort of display for the so-called soft communism of the state, and had to be shown to the world as proof of the successful Yugoslav 'third way'. New kinds of regulations had to overcome, as painlessly as possible, the internal dogma of the ruling structure which, even though quite minimal in this case, had greater strength than the national laws that ruled as the highest and irrefutable authority of the state. In the period up to the Homeland War, the restoration of Dubrovnik was tasked with preparations for the eventuality of a very strong earthquake that could very easily occur in the seismic zone of Dubrovnik. In this respect, it was necessary to document the existing situation so that anything that was eventually destroyed could be rebuilt or repaired. The following phase was to constructively strengthen those buildings that fulfilled at least one, and almost as a rule, two conditions. This covered existing structures that were either constructionally unstable or those that were located on a seismically dangerous microlocation. Priority was given to buildings that were historically more important. However, no matter how logical these criteria appeared, time proved that they were not the best ones. Some projects were started without enough experience on how similar undertakings were affected after a certain period of time. Some were entered experimentally, and at least in our case, with unverified materials, procedures or methods. Presently, as a result, we have problems with the washing away of insolation material on the fortresses St. John and Revelin, construction problems on the Rector's Palace, the unsuccessful interior decoration of the Cathedral, as well as problems with the unfinished, and so-called irresponsible archaeology of the Pustjerna and Andrija sites.

Meanwhile, the devastations of war began and a programme for the restoration of war damages substituted the seismological programme. Most of the work involved the completion of documentation related to the restoration of heavily damaged palaces, houses, streets,

churches, and individual artefacts, such as statues, coats of arms, crowns of wells, and so on. This was followed by a systematic restoration policy where priority was given to housing, succeeded by city symbols, and finally, with other less damaged buildings. In order to illustrate the extent of the destruction, we indicate the main data on the war damages to the cultural monuments in the historical part of Dubrovnik. According to the data published on June 24, 1998 by the State Committee for the Listing and Evaluation of War Damages in the Dubrovnik-Neretva County, the total damages to the cultural monuments in the Dubrovnik region amounted to 18,663,122.00 US\$. In the housing sector, 11,164 flats were damaged from a total of 23,572, as follows:

- 1st category of damages: 4,099 flats or 37 per cent,
- 2nd category of damages: 3,002 flats or 27 per cent,
- 3rd category of damages: 2,031 flats or 18 per cent,
- 4th category of damages: 761 flats or 7 per cent,
- 5th category of damages: 706 flats or 6 per cent, and
- 6th category of damages: 565 flats or 5 per cent.

The data published in 1993 by UNESCO in Paris is somewhat different. The first estimate amounted to 9,577,927.00 US\$, only for that part of Dubrovnik contained in the UNESCO World Heritage List that was published in the so-called Action Plan for the Restoration of Dubrovnik, that is, the UNESCO publication, Dubrovnik 1991-1992, *Cultural properties damaged by shelling*. For both data, it should be mentioned that we are dealing with so-called direct damages that do not include such indirect damages as lost profits, and lost value due to lower monumental worth, etc. Also, it deals only with constructional damages and not the damages related to equipment, furniture, installations, pictures or anything else contained in buildings at the time of attack. The Institute for the Restoration of Dubrovnik, on the basis of average prices and realistic on-site estimates and previous restoration experience with the Dubrovnik Restoration Programme, made an estimate of the restoration costs for the damages to the historical site of Dubrovnik. This included the compilation of documentation material, the required archaeological work, the planning and acquiring of necessary documentation and licences, the transportation of waste material, restoration and reconstruction tasks, and so on. The estimate was three times greater than the direct damages, amounting to around. 50,000,000.00 US\$ for the county, or around. 28,500,000.00 US\$ for the historical site of Dubrovnik.

Logically, maintenance should be ranked second, right after conservation, and before restoration. However, we rank maintenance third as we believe that it is very highly neglected. At least in the case of Dubrovnik, and with a relatively high level of certainty for all cities in general in Croatia, we believe that it was replaced by restoration. Specifically, the level of neglect was so high that it played a major role in the deterioration of buildings. Unfortunately, even the renovated buildings were not maintained later on, not even minimally. Today, they are once again in need of restoration, in spite of the costly and complicated procedures already carried out that were meant to ensure a 'new youth' of at least fifty years. Of course, we can ask the question why? We are of the opinion, alongside the fact that we are dealing with up to three-century-old buildings that are exposed to hundreds and thousands of minor earthquakes

annually, that the main reason lies in the fact that the public property system completely lost its interest in investing in regular maintenance, let alone irregular maintenance. It was all everybody's and nobody's and there was no efficient system of making sure that the users, whether tenants or legal entities, would upkeep the property value. We can say, based on the 22-year history of the Institute for the Restoration of Dubrovnik, that the philosophy of restoration and conservation applied to Dubrovnik has not withstood the test of time where maintenance is concerned. The cultural use of a building was proposed much too frequently by conservationists, appropriate institutions and bodies involved in the restoration of Dubrovnik when faced with the improbability of reestablishing a building's original function, regardless of what it implied. The noble intentions resulted in empty palaces that have still not been given any purpose. The so-called cultural content was not clearly defined by anyone involved. In the absence of a right idea, they were not even allowed to be used by cultural institutions or unions that did not have any existential means, let alone those needed for maintenance purposes. The toleration of such a situation was a bad example for citizens as well. It became apparent that the 'worst-off' situation would be rewarded with the 'best' situation, or rather, would receive priority in the restoration programme.

Revitalization is not necessarily the next step in the logical ranking of conservation - maintenance - restoration. However, if any one of the above elements is missing, revitalization becomes questionable, if not impossible. Revitalization is not a natural process in the evolution of a historical site. In fact, it could be said that revitalization is a desired method that is quite opposite to the natural process of everything built in the world, which become increasingly older, and thereby more exposed to wear and tear, fatigue and deterioration, all as a result of the material substance, or exposure to external aggression, whether natural or man-generated. It follows that revitalization is a carefully conceived, long-term management process that eliminates the detrimental effects to and around a monument, allowing for the establishment of the desired state and trends.

Unfortunately, we stand very poorly with respect to Dubrovnik's revitalization plan. The historical area has fewer inhabitants than it has had in the last approximately 100 years. The age and educational structure is worse than in other regions of the city. The failure of revitalization is most seriously demonstrated by the failure to implement the vision of touristic and congressional events in the historical site. The touristic construction of Pustijerna and a congressional centre in Fort Revelin were never realized. There are many good reasons for this, especially the one that places the blame for the disruption of tourism in Dubrovnik on war. However much the war contributed towards the clouding of tourist trends in general in Dubrovnik, we do not believe that this is the real and true reason for the failure of tourism's revitalization in the historical site of Dubrovnik.

It was most unfortunate that the kind of tourism we had, and sadly enough, the kind that still appears to be acceptable to the many opinion makers of future tourism in Dubrovnik, did not have the strength to realize and quasi-revitalize the projects that were in fact only poorly disguised attempts to turn the touristic construction of the historical area into attractively camouflaged forms of revitalization. Even more so, the ulterior motives were to profit in part from the advantages to be had from investments in monuments. Without any deeper elaboration of this question, we would like to point out that a precondition for the revitalization of any historical site, including the one in Dubrovnik, lies in a pre-conceived strategy that is the result of serious analyses carried out on the various aspects of life in a historical area. Revitalization also includes a multi-disciplinary approach in programme planning that involves the public in all of the preparatory phases. After democratic decision-making procedures, it implies the

involvement of all concerned, including political parties, both present and future citizens and users, and professional and administrative bodies.

Acknowledgements should be given to the former authorities in the Socialist Republic of Croatia, as well as to the present one, for the sentiments shown towards Dubrovnik. Not only did they understand the existing dangers of earthquakes, devastations and so on, but they also managed to find the means and mechanisms needed for the financing of accepted programmes. This can be seen from the following:

Table 1

REVENUE IN US \$

	1979-1991		1992-1999		TOTAL	
		%		%	1979-1999	%
1. SRC/RC¹	52,134,000	56.88	8,300,462	71.00	60,434,462	58.47
2. COUNTY/CITY	22,652,943	24.72	544,979	4.67	23,197,922	22.45
3. SFRY²	6,207,000	6.78	-	-	6,207,000	6.01
4. OTHER	10,654,057	11.63	2,842,644	24.33	13,496,701	13.07
TOTAL	91,648,000	100	11,688,085	100	103,336,085	100

Source: Institute for the Restoration of Dubrovnik, Report 1979-1999.

Right from the start, the main source of revenue for the restoration programme was from budgetary or para-budgetary means. The manner in which it was gathered depended on the tax system in force at the time. However, regardless of this, we can define two main systems that financed the restoration of Dubrovnik. One that was valid in the former country, and one that has been valid ever since the Institute for the Restoration of Dubrovnik was taken over by the Ministry of Culture of Croatia.

The first system maintained the idea of decentralized financing, whereby the amounts meant for state funds were not transferred to the state budget. Instead, they were reallocated for restoration purposes. The second system encompasses part of the local transaction taxes and redirects it in the same way. The most interesting idea was the para-tax for tourists that paid a kind of surtax on particular tourist services that was intended for the restoration of Dubrovnik. This was a kind of forerunner to the regular revenue that was gathered according to the present Law on the Conservation of Cultural Wealth (Official Gazette no. 69/99). In the Dubrovnik region, it should be mentioned that it was not applied only as a tax for the restoration of Dubrovnik, but in the form of so-called tourist taxes and as a surcharge on sojourn taxes intended for the financing of the Dubrovnik Summer Festival.

The circumstances of war, when a complete breakdown of main local activities occurred, ie. tourism, as well as the new centralized tax system, especially after the introduction

¹ SRC is the abbreviation for the Socialist Republic of Croatia while RC stands for the Republic of Croatia.

² SFRY is the abbreviation for the Socialist Federal Republic of Yugoslavia.

of value-added tax, brought about the main mode of financing the restoration of Dubrovnik through state budget funds. Due to the circumstances surrounding restoration that have already been mentioned - war and post-war restoration brought about more emphatic ways of financing, such as donations and aid, which could not be counted upon in 'normal' times. It should be emphasized here that there is absolutely more room for certain forms of financing that have been barely touched, such as the establishment of funds, foundations, NGOs for certain restoration projects, and so on. Besides, the method of collecting monument taxes was never realized. A procedure has already been started to change the Law on the Protection and Conservation of Cultural Heritage according to the recommendations received from the union of cities listed on the UNESCO World Heritage List, or those pretending to be on the list.

Both systems were used long enough so that weaknesses could be detected in both. On the one hand, the weakness of the so-called local government model lay in that the burden to the tourist industry and the tourists themselves was arbitrarily determined without considering whether the realistic potentials of tourism could support this without any consequences.

On the other hand, some projects were never realized - specifically, the so-called tourist ones, even though they were used as 'justification' for the burdening of tourism. Furthermore, some projects were realized even though they had no connection whatsoever to the original purpose, such as the Bonino bridge, the purchase and the construction of the ex-SDK (Institution for Payment Transaction) building, and so on. In the new state, the major weaknesses resulted from very complicated decision-making structures, the non-flexibility of restoration programmes, the burdening of the programme with value added taxes and a two per cent contribution tax for the housing of the war-struck homeless, and so on.

The inactivity of monument taxes, the lack of a legal infrastructure for the modern financing of restoration programmes, and the non-existence of stimuli for investments in cultural monuments, objectively disabled the investment of any other funds except for those budgetary. It is therefore no wonder that the overall funds realized are still significantly lower than those from the pre-Homeland War period.

Aware of the fact that tourism is the main, if not the only economic branch for a long time yet to come in the future of Dubrovnik, we took a survey on the views of tourists regarding the historical site of Dubrovnik as a main resource for tourism in general, especially for cultural tourism. We arrived at some interesting results that indicate the steps needed for restoration and revitalization procedures, in order to achieve the best and most profitable tie between monumental features and the worth of Dubrovnik with that of a sustainable development of tourism in Dubrovnik. We only mention the most important points that are relevant to this paper:

Table 2

City aspects that tourists found most satisfying

Urban and architectural characteristics	1
History of the city	2
State of conservation and cleanliness	3
Local inhabitants	4
Monuments	5
Weather	6
Peace - solitude	7
Gastronomy	8
Street lighting	9
Cultural events	10
Enterprises	11
Shopping	12
Entertainment	13

Compiled: author and associates

Table 3

City aspects that tourists found most dissatisfying

Lack of information and tourist signs	1
Hotel and restaurant prices	2
Monument business hours	3
Street garbage	4
Lack of cultural events	5
Poor supply in hotels and restaurants	6
Other	7
Parking	8
Transport	9
Narrow streets	10
None	11

Compiled: author and associates

Table 4

What Dubrovnik lacks

Tourist signs	1
Better information and reception of guests	2
Change in monument business hours	3
More guide books	4
More economical prices	5
Good city plan	6
Better approach to the city	7
Night life	8
Entertainment	9
Cultural events	10
Better city transportation	11
Parking	12
Other	13
None	14

Compiled: author and associates

Finally, we conclude with an overview, conditionally speaking, of the rights and obligations of proprietors and building users in the historical site of Dubrovnik, and emphasize that we are aware of the risk of oversimplifying this phenomenon:

Legal Rights:

- war damages - complete restoration depending on category,
- earthquake damage - constructive repair,
- constructive strengthening of the building,
- exemption from certain taxes,
- free engineering and consulting.

Obligations:

- free access to the building for restoration purposes,
- limitation of proprietor rights,
- operative limitations on the building as per the conservation regime,
- maintenance.

In order to maintain an equilibrium between legal rights and obligations, it is necessary to ensure long-term, transparent, democratically-elected and just conservation, maintenance, restoration and revitalization policies. This can be done by detecting the illogic, injustice, inconsistency or errors of a system that has existed in Dubrovnik for over twenty years. Also, the established system has to be monitored in a multi-disciplinary way. A mechanism for the timely detection of a problem and its solution has to be ensured as well. Only in this manner can we ensure that these processes, already complicated and expensive, will give the necessary and projected result that equals the efforts and means invested.

Tourism Niche Markets in the Welsh Urban Context: Swansea, a Case Study

Ian Jenkins and Andrew Jones*

Introduction

The word 'niche' seems to have gradually crept into the vocabulary of tourism over the last ten years. However, the existence of niche markets is not necessarily a new phenomenon. In fact one might well argue that the very roots of European tourism may have started from a niche. The Grand Tour certainly was to some extent specialized and selective which may be reflective of our understanding of the characteristics of a niche. Currently, the concepts of niche markets are fashionable and seem to carry some credence. However, on further examination the term and its characteristics seem to be somewhat unclear even though there appears to be an assumption that the word has a standard meaning.

This can be illustrated by citing the UK and Irish Tourist Boards. The Department of Culture, Media and Sport (DCMS) states, within its fifteen point action plan for tourism, that *'the development of innovative niche markets, such as film tourism and sports tourism, to unlock the full potential of Britain's unique cultural and natural heritage will be part of making Britain's tourism industry a world leader'*. (DCMS 1999 : 4). This clearly emphasizes the importance of niche markets to the potential of Britain's tourism product. The Bord Failte also recognize the importance of niche markets to their tourism products and state *'Concentration on niche markets, regionalisation and further branding strategy, Tourism Brand Ireland, are the key elements in the Bord Failte's Marketing Plan for Irish Tourism in 1999'* (1999 : 1). However the definition of the word niche is not given within these documents and the characteristics of a niche is alluded to through the use of product examples.

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¹ Surfers Paradise is the tourist centre of the Gold Coast and often the entire 30 km stretch is referred to as 'paradise'

It may well be that niches are the outcome of a post-modern society reflecting a splintered market offering numerous specialized products. This can be demonstrated through the University of Nevada, Las Vegas, tourism website. It lists twelve pages of 'Niche Travel Markets for Tourism and Hospitality'. On page one, alone, it identifies sixty-six different products, which are segmented under broad headings. For example, the segment 'Gay & Lesbian' includes a list of specialized products such as, *'Friends Travel, Gay Friendly Vacations, Gay Holidays, PlanetOut, And Whistler Gay Ski Week'*. Other segments such as 'Ethnic Travel' products specify niches such as Aboriginal Tourism, ArimSoft Tour Server, BarMitzvah Tours, Celtic Tours, Jewish Outdoor Adventure, and Traveland Kosher Tours. Ten years ago these segments (broad headings) would have been identified as niches, but it appears that the concept of a niche has changed. This assertion can be supported from the literature with reference to Weiler and Hall (1992) where 'special interest tourism' is considered a segment but the products on offer within this are specific and reflect the development of niches.

Concepts of Niche Markets and Urban Cultural Tourism

Characteristics of Niche Markets

The evidence seems to suggest that niche markets may be the next step in the segmentation process of tourist products. On the other hand it may well be that niche is currently a *fashionable* word which is considered to be a new concept in tourism development. Consideration of the concept of segmentation and the rationale behind its theoretical elements can provide a platform to explain niche markets.

Segmentation is now an accepted strategy for dividing the market place. As Lumsdon notes: 'Segmentation is essentially the first necessary step, a subdivision of the total market into discrete and identifiable segments in accordance with a number of clearly defined characteristics' and he further adds, 'the reasoning behind the three step process lies in the number of advantages to be gained by companies when pursuing such an approach' (1999 : 65).

Middleton also states: *'Its purpose is to facilitate more cost effective marketing, through the design, promotion and delivery of purpose-designed products, aimed at satisfying the identified needs of target groups'* (1994 : 73). The segmentation has a number of characteristics, namely discrete, measurable, viable and appropriate (1994 : 73). Lumsdon (1999) suggests segmentation improves the effectiveness of companies to deliver the product in a number of ways, namely meeting the needs and wants of the customer, providing opportunities to develop new products, being ahead of the competition, and identifiable markets. It is also inferred that segments are markets of some considerable size, namely families, age groups, attitudes/psychographics. In addition, the markets are targetable, which allows direct contact with these customers.

Niche markets seem to be a further evolution of splintered market segments and have developed due to a number of significant factors, one of which is the sophistication of current consumers. Middleton notes: *'From a marketing standpoint, the response of the next decade appears to lie in more systematic segmentation and upgrading of products to meet the emerging needs of Toffler's heterogeneous future society - another way of describing niche markets.'* (1994 : 365). Weiler and Hall also support this and note that the consumer is looking for ever more varied experiences.

Rather like the concept of sustainability, niches seem to perpetuate numerous definitions and understandings. A number of attributes can be identified. Dahringer and Muhlbacher note that niche markets give firms added advantages, in terms of '*special market needs, concentrating its resources in a narrow field where it has a distinct competitive advantage*' (1991 : 292-3). What is also interesting is that this text is focused upon global marketing, which must infer a market of some significance and size. Stern and El-Ansary suggest that niche markets are a proven technique with high performance outcomes and a means of '*specialising in one or a limited number of product categories*' (1992 : 146). Importantly, these assertions lack specific detail and are somewhat unclear. This again emphasizes the problem of 'specifically' separating a niche from a segment.

One could also challenge the current marketing theories, which postulate that in order to create a segment, a product, and hence a purchase there is a need to create a *destination image* and an identifiable *brand*. It could well be that if the niche market is totally *unique* then the product sells itself and markets the destination. This could be a reversal in the concept of the current philosophy of selling destinations as expounded by Bronhill cited within Gold and Ward (1994). She notes that: '*Place promotion has to be seen as part of this 'pump-priming' strategy.... Far from Docklands development being demand led, that demand has been created. What better way to create demand than through changing the image of the area through the marketing and publicity tactics associated with place promotion?*' (1994 : 135). She further adds: '*It could be argued that Docklands have always been more of an idea than a place.... Docklands have only ever existed as an area demarcated on a planner's map and do not correspond to any sense of shared space or identity amongst the people living there*' (1994 : 136).

Her assumption is based upon the notion of a consumer searching for a destination not a unique product. Could this be different for niche products? Her viewpoint may be further supported by the change in the consumer market, in which product information is now far more accessible via the Internet. The supporting elements of the tourism package, which includes travel and accommodation systems, can now be directly accessed by the consumer, circumventing the 'package' function of previous periods. This notion is supported by Weiler and Hall who state: '*A critical element of active and speciality tourism is the realisation that transport and accommodation considerations alone do not provide the tourism product*' (1992 : 5).

Taking the argument further, a niche could be considered to be a totally unique product, suggesting that a sense of place and the destination image may have limited importance for the purchase of the niche product. The implication of this, as with the literary case studies (Dylan Thomas) in this paper, is that **the niche sells the location, not the other way around**. If this is the case then the product can be used as a strategic lever to actually create a tourism strategy, thus challenging current thinking. This point will be explored later in the case study of Dylan Thomas.

These issues aside there are a number of characteristics that can be related to the idea of a niche market.

1. Highly Specific
2. Highly Selective
3. Highly Focused

Niches therefore are highly selective parts of the whole, suggesting an element of linkage within larger segments of the industry. This may well be the nub of the argument, when does a niche become a segment and vice versa? Are niches small elements of segments and if so how small? If this is the case, segments may therefore be composed of niches, which are linked together. To some extent this reflects the other case study, the Swansea Bay Summer Festival. Furthermore, the Bord Failte notes '*Niche Markets will focus on products such as golf, angling, walking, cycling, conference facilities and heritage.*' (1999 : 1) and these markets lack to some extent, the element of selective and specific focus.

It is also evident talking to tourism actors that the concept of niche has changed over the last few years. Namely, the context that the Bord Failte uses may well be the original concept, but this has now moved towards far more specific and specialized aspects of the tourism product. For example gardens and sport are clearly considered to be niche tourism products (Von Weber 2001). However, it could be argued that these are in essence segments, as gardening and sport can be divided into numerous smaller products with specific appeal. In discussion with a number of tourism actors there have been suggestions that the concept of niches has changed over the last few years. Von Weber (2001) notes this and considers her understanding of a niche to be different from that of a number of years ago - the difference being towards higher specialization.

Niche markets raise a number of marketing issues and may well begin to challenge current thinking on image and branding. Some important considerations are the size of the market, number of repeat visits, the likely length of the product life cycle, fine-tuning targeting and the nature and contribution made to the local economy.

The Value of Culture to Urban Tourism

Cultural features are an important part of any tourism product and it is culture and its differences which enhance the motivation for travel and tourism. The classic tourism models of Wanderlust and Sunlust identify culture as an important motivational force for tourists to travel to other countries or even within their own country (Pearce 1987). It is also a truism that **heritage and culture are used to convey a sense of place and image**. Perusal of most countries' marketing advertisements will identify cultural elements whether conveyed as the dominant element of the package or providing a supporting role (Gold and Ward 1994). This confirms the economic value of culture to the tourism product, yet clearly the economic worth of culture is much debated and disputed. That aside the economic evidence clearly supports the notion that culture is an economic commodity and has an important part to play in the urban tourism product. As Dietvorst notes '*The city is being rediscovered for the purposes of tourism and recreation...positively emphasised in a never-ending flow of plans to renew city centres and waterfronts*'; he further adds '*...and more attention is being paid to the cultural function of the city centre*' (Ashworth and Larkham 1994 : 69).

This interest in culture is particularly important for tourism within the UK. The image of Britain is focused upon its heritage and is clearly one of the main reasons why tourists visit Britain. Rodgers notes '*the arts in Britain are a major sector of the economy. They are comparable in their importance to the national economy with such giants as vehicles and fuel and power; they are vital export earners, an important source of employment and a power for the good in regional development*' (1989 : i).

A number of economic models relating to strategy have been generated to explain the use of culture within the context of tourism, namely:

- the windfall gain model, which suggest that culture already exists within a place and can be adapted to be used for tourism purposes;
- the turnstile model, which identifies a product as appealing to a number of consumer markets;
- a commodification model, which focuses on the *assembly* of cultural products from cultural resource bases which were not previously traded;
- an economic systems model, which acknowledges the *wider* implications of commodifying a cultural resource as it will impact upon the wider economic systems within the area (Graham *et al.* 2000 : 139-146).

Understanding the implications of these models is important in order to produce a strategic plan for the development of cultural tourism. In terms of the Welsh and in particular the Swansea niche products, these models have some relevance, and to some degree the following case studies have linkage to all of these models in one form or another.

An Evaluation of Festivals, Events and Literature in Urban Tourism

The two case studies - Dylan Thomas and the Swansea Bay Summer Festival - are considered to be within the aspect of urban cultural tourism. Consequently, it is pertinent to explore some of the conceptual issues that affect these tourism products. The following discussion reviews the current literature within these areas.

The Role of Festivals in Urban Tourism

Festivals and events are increasingly being used as a product of urban tourism to facilitate the development of new tourism products, establish new tourism business opportunities and to help in redefining tourism seasons (Richie 1996). Over the last decade there has been much literature and debate on the role of festivals in tourism development and many definitions have been suggested to differentiate the type of events that have been promoted.

There are, therefore, both numerous definitions and numerous interpretations put forth by theorists. Richie (1996), however, provides a useful interpretation of an event by offering a general definition, for example '*A major one time or recurring event of limited duration, developed primarily to enhance the awareness, appeal and profitability of a tourist destination in the short or long term. Such events rely for their success on uniqueness to create interest and attract attention*' (Richie 1996).

Hall (1990) has also offered some useful definitions by stating that: "*Events, either on a one off or cyclical basis, mark moments of celebration, spectacle and performance which can have a dramatic effect on those who directly or indirectly experience them*" (Hall 1990). In conjunction with these general interpretations several commentators have contributed to discussion on the benefits such events can have on a specific urban locality. For example, Bonnemasion (1990) states that events: '*Serve a totemic function. They employ a collection of symbols that define the community and represent it to the outside world*' (Bonnemasion, cited in Getz 1991).

This again is important when trying to gauge the true impact of an event. It is, however, not just community issues that are in the forefront of event promotion or development. It has been highlighted that economic benefits are also often seen as a greater goal for organizers and investors. For example Gitelson and Uysal (1994) state, *'Although the goals of festivals vary depending on the community and organisers, one underlying goal of most festivals is the potential economic impact it will have on the community or destination'* (Gitelson and Uysal 1994).

Economic factors appear to be a consistently dominant factor in promotional reasoning, and in theoretical underpinning. The economic construct is also often tied in with tourism economic development and growth for an area (Bos 1994). In this respect Hall also comments that events can be both inward and outward looking, not only providing a means for community celebration but importantly they can be increasingly used to achieve wider urban regeneration as well as economic and employment objectives (Hall 1992).

Economic drive is also often encapsulated and produced from the more complex and deeper realms of political input. As far back as the late 1980s Roche believed that the foundation of event definition was formed primarily on a political basis, suggesting that many events are not the result of a rational decision-making process but tend to grow out of a political process which often involves actors, individuals, interest groups and organizations in a struggle for power or political recognition (Roche 1989).

Events can, therefore, be categorized by many interpretations. Ultimately, however, the main motivators for hosting events tend to concentrate on factors that include profit, motivation linked to tourist development, media coverage and political gain, sociological effects and cultural development on the indigenous population. It would appear, however, that many would agree that a combination of these factors has varying effects on a host city with many economic, social and cultural 'knock-on' effects generated from hosting an event. These can be summarized by authors such as Getz (1991), Hall (1992), Mules (1993), Richie (1996), Walle (1996), Dimanche (1996), Swarbrooke (1999) and Sharpley (1999) into six main motivational categories which include:

- economic;
- tourist/commercial;
- physical/environmental;
- social/cultural;
- psychological;
- political.

The economic gain to event promotion, as already discussed earlier, is often seen as one of the most important reasons to host such activities. Hiller (1987) confirms this by stating: *'perhaps the most compelling reasons communities support the hosting of events is due to economic impact'* (Hiller 1987, cited in Watt 1998). However, in opposition to this, Getz (1998) proposes that investment in events could potentially channel funds from other competing projects (Getz 1998).

Travis and Crozie (1987) continue this theme with an analysis of leakages from external factors such as vendors who arrive from outside the community, make capital and leave to spend this profit elsewhere. Tourism and commercial outputs are further explored by Spilling

who suggests that events can be analyzed in terms of how they can contribute to develop an urban locality or community as a tourist resort with improved infrastructure and facilities, and how the event may contribute to market the destination, create a positive image, attract tourists and increase visitor spending (Spilling 1998). A note of caution from Sparrow (1989) on the other hand suggests the notion that an event will only have a temporary effect, and soon after the event commercial activity will return to normal.

The hosting of events to encourage or act as a catalyst for urban regeneration and improved infrastructure is a notion explored by Hughes (1993) and Crompton (1994). They suggest that event promotion should prioritize and benefit regeneration foremost, as this will ultimately affect the continuing ability of an urban locality to attract post-event tourists. Hughes also suggests a note of caution in that careful planning needs to be heeded, otherwise social exclusion, environmental conflict, physical pollution, and a breakdown of sensitive heritage areas by insensitive tourism may occur.

Events can often also be seen to offer cultural and social benefits through promoting cultural identity, for example past regional history, or historical figureheads are often used as symbols, easily recognized by tourists. This is espoused by Ujdur (1993) but with a warning that social problems can also be created through gentrification (Ujdur 1993). This is an argument supported by Darcy and Bounds (1994) who state that, '*events can have a detrimental effect on low income people who are disadvantaged by a localised boom in rent and real estate prices, creating dislocation and a loss of community identity in extreme cases*' (Darcy and Bounds 1994). Nevertheless, deep-seated community pride can also be raised from events, projecting feelings of unity on an urban, regional or even national scale. In this respect Hall (1992) states that events can have a powerful effect on not only the host community, but also on the visiting population (Hall 1992). Ultimately it is political influence that can perhaps be the driving force behind any large-scale event. Often the government, be it local or national, will combine with others to set up events. This political interest is often aimed at boosting the public image of a party, to secure future election gain or to support wider political movements. In this respect politics can often override the social, cultural and environmental issues in staging events.

In summary the literature tends to illustrate that hosting events can entail and result in a complex range of outcomes for an urban locality with success or failure being determined largely by a range of socio-economic, environmental, cultural and political indicators. Clearly the type of event proposed, its location, organization and aims will determine the impact of an event on these indicators. No event will be the same, as individual events will be determined by the local environment in which they are to be hosted.

A Review of the Tourism Product within Wales and Swansea

Wales' Tourist Policy and Products

The policy and resources of the Wales Tourist Board are of critical concern for the delivery of the Swansea tourist product, especially in terms of strategic planning and the possible development of new types of products such as niches. The following sections review the state of Welsh tourism.

Wales is a small country geographically, with a population of approximately three million, located on the western periphery of the UK. It has its own spoken Celtic language and is unique in terms of having 'a Celtic heritage with strong cultural and linguistic traditions' (WTB 2000 : 80). The Wales Tourist Board (WTB) has set the overall agenda for tourist development on a macro scale, and this is supported to a notable extent by local government and now the National Assembly, which is a new regional government. In the case of Swansea, tourist development policy and management is at the City Council level, with consideration of the national strategic policies of those organizations mentioned above.

Wales' Current Markets

The tourism industry is an important sector of the economy, providing Wales with the following economic benefits:

- £2 billion from direct visitor spend
- 7% of GDP
- 10% of direct and indirect jobs = 100,000 jobs

Source WTB 2000 : 15

The market is dominated by UK domestic tourists, who represent 83 per cent of all tourist visitors to Wales and is higher than the UK profile of 70 per cent. Added to this 60 per cent of all expenditure occurs within a period of three months, compared with only 50 per cent in the UK, therefore causing problems of seasonality (WTB 2000). The market has changed over the last ten years and now exhibits the following characteristics:

- Wales currently finds itself in a position where the main products being offered are in declining markets such as the long-stay seasonal product and therefore is struggling in terms of growing markets, such as short break and international tourism;
- under-achievement in the high spending and less seasonal overseas market represents only 2 per cent of UK tourism expenditure. However research has shown some positive issues to be taken from the current overseas market as these visitors to Wales are '*more likely to be previous visitors to Britain, tend to have an older profile and to be more experienced travellers.*' (WTB 2000 : 21) They also '*tend to stay longer than UK visitors, travel more widely, spend more per visit [£222 compared to £112] and are more likely to stay in serviced rather than self-catering accommodation*' (WTB 2000 : 21);
- WTB's international marketing budget is focused on five countries, the Republic of Ireland, Germany, France, USA and the Netherlands;
- Wales has an image problem and currently the location and brand of Wales is not well-known internationally;
- the family market is important as families tend to take longer holidays and it is believed that Wales has the potential to receive these visitors.

Structure of Tourism in Wales

It is characterized by a fragmented product of small businesses. The WTB states 'it is dominated by small family run businesses most employing less than ten employees. It is a diverse industry and the product on offer is a hybrid of experiences' (2000 : 30). Consequently there are few national or international companies operating in Wales, which is not propitious to marketing and branding Wales on the international market.

Accommodation in Wales is characterized by self-catering which accounts for over 66 per cent of the bed stock. The quality of the accommodation is varied. The serviced accommodation includes Bed and Breakfast accommodation (B & Bs) to luxury Country House Hotels, with some international hotels in city centres. Room occupancy is generally below that of the rest of the UK. A large number of the accommodation provision is found along Wales' coast, which reflects the old traditional markets (WTB 2000).

Attractions in Wales also vary; 40 per cent are publicly owned, although there has been lack of investment, which has compounded the decline in visitor numbers to these facilities. This has always been a problem when compared to the internal domestic competition of the south-west of England, whose attraction base is much better.

Access to Wales has also been through England. Wales fails to fully develop its own gateways, especially international ones, and still relies heavily on the international airports of London, Birmingham and Manchester. It does have a small but serviceable airport of its own where international flights do occur but scheduled services are usually via a shuttle link to Schipol, Amsterdam. The access routes to it are extremely poor which again exacerbates the problem of 'image creation' and 'sense of place'. To some extent this is a historic legacy of control by the British Tourist Authority of Welsh tourism, where Wales was marketed through the gateway of London.

Current Strategic Development

In order to plan tourism development the WTB have produced strategic documents for Wales. The latest, 'Achieving Our Potential' (WTB 2000) has been recently published and details the policies for the next ten years, incorporating the following objectives:

Action Strategy Objectives:

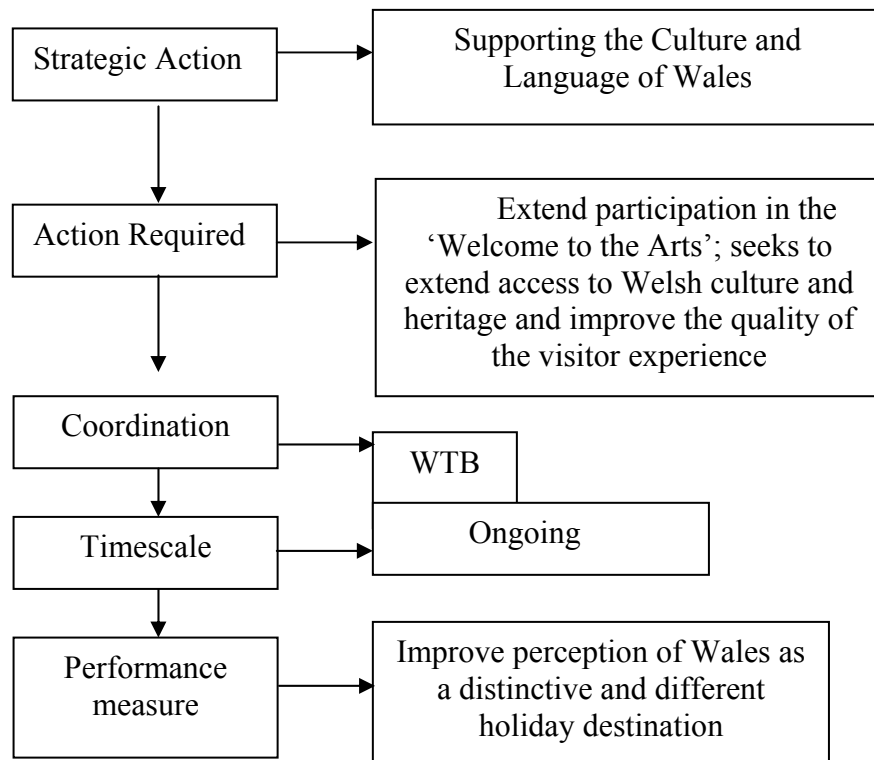
- to market Wales more effectively as an attractive all-year-round tourism destination;
- to exceed the expectations of visitors to Wales by providing high standards and ensuring that investment in tourism is responsive to their changing needs;
- to improve professionalism and innovation by raising the profile of the industry and enhancing skills, training and motivation within the industry;
- to embrace a sustainable approach to tourism development which benefits society, involves local communities and enhances Wales' unique environmental and cultural assets.

These objectives are supported by action and evaluation target models, to ensure the objectives are met (see fig.1). An examination of WTB's strategy fails to identify directly clear references to niche products. The inferences are that niche products will be incorporated within

the wider segments designated by the strategic document. This again illustrates the reticence by national tourist boards to fully detail strategic advantages of niche products.

Figure 1

**EXAMPLE OF WALES TOURIST BOARD
STRATEGIC ACTION PLAN MODEL**



Source: WTB 2000, *Achieving Our Potential*

Swansea and City Region as a Tourist Destination

The City of Swansea is Wales' second largest city. It has a population of just fewer than 200,000 with an additional 31,000 living within the county's boundary. Swansea has a seafront/bay location, which stretches from the city centre around to Mumbles village (9 km) and on to the Gower Peninsular, an area that was designated an Area of Outstanding Natural Beauty (AONB) in 1951. The city has always had mixed traditions between industry and tourism which Dylan Thomas described as an 'ugly, lovely town'. Thomas has also commented that no one has described the city so neatly or accurately since (Thomas cited in Parker and Whitfield 1997). Nevertheless, Swansea's tourism development has, in the past, relied upon traditional forms of tourism, which have been based upon 'sea and sand' within traditional seaside localities such as Mumbles and Gower, providing traditional tourist facilities and

infrastructure. These locations have historically provided a holiday destination for visitors from the industrial belts of South Wales and the industrial heartlands of Central England.

The downturn in these market sectors over the last thirty years has meant that tourism in Swansea has increasingly had to redefine itself in order to sustain effective tourism markets (Vincent 2000). In this respect major sections of the city have been and continue to be modernized, refurbished and regenerated. Projects include the regeneration of the maritime quarter (with a large marina and housing complex, a maritime museum, shops and cafes and numerous public buildings), which is now nearing completion. A major strategy to upgrade the traditional tourist venue of Mumbles including the regeneration of the promenade and pier are in progress. The Swansea Bay Cycle Path, which comprises what some have termed a coastal linear park, has been completed and major refurbishments in the city centre, including major planning and urban design projects to re-design the central area into distinct quarters for tourism, leisure, culture, retail and business, are also in progress. (SCC 2001; SCC 1999).

These developments provide an important backdrop for sustaining tourism growth in the city. As such the main thrust of tourism development and strategy is coordinated by the Economic Development Unit, the Development Department and the Department of Leisure and Recreation of the City and County of Swansea Local Authority. In this respect tourism continues to provide an increasingly important contribution to the economy of the city. However, tourism festivals in the past have not had a major impact on tourism development. This has often been attributed to the fragmentation of past event practices (Sharpley 1991; Welsh European Funding Office 12/5/00). This fragmented approach appears also to affect the two niche products identified in this paper, Dylan Thomas and the Swansea Bay Summer Festival.

As defined in Pearce's (1992) typology of tourist organizations, Swansea is involved in the national, regional, and local strategies for tourism development and management. Policy and management starts with the strategic view of the national tourist agency - The Wales Tourist Board (WTB). It indicates the use of models in its strategic plans, for example in the development of 'Partnerships' and of 'Integrated Development Programmes'. It sees its management function as coordinating the working links, and encouraging actors such as those in the commercial sector, to link with public sector players, and to involve both in community consultation (WTB 1997). WTB gives a clear role to urban areas in its national strategy: '*...The Urban Tourism Programme seeks to develop the short break, conference and day-visitor markets in Wales' main urban centres*' (WTB 1997 : 8). As Wales' second largest city, Swansea's roles are seen clearly in this context. Regional development policies are indicated in terms of 'Partnership Approaches' - namely those of the South West Wales Economic Forum, which was established in 1997.

Economic Profile

It is estimated that in 1997 some 2,659,000 tourist bed nights were spent in Swansea, and that total visitor expenditure was £144.4 million. The EDU (Economic Development Unit) estimated that 4,649 FTE (full-time employment) tourist jobs existed in the city (EPS, 1998). Shopping and business day trips and short-stay visits are concentrated in the central city, and longer-stay tourism tends to focus on the rural and coastal Gower. Seasonally there is heavy recreational day-tripping to the Gower Peninsula as well (SCC and NPP 1998).

The evidence suggests that Swansea offers an eclectic tourism product; the strongest pull is seasonally to the natural beauty of the Gower. A number of urban attractions supplement the natural resource. The city's Leisure Centre is the major attraction, and also of great importance is the Marina area, including the Industrial and Maritime Museum, retailing, catering and cultural attractions. No visitor numbers were available for gated attractions in the city. Cultural events and two theatres are significant elements in the tourist package. According to the City and County of Swansea and Neath and Port Talbot County Council (1999 : 51) the Swansea Bay city tourist product includes the following attractions:

- 18 sporting attractions;
- 10 museums and galleries;
- 5 country-parks and gardens;
- 11 other attractions of different types.

Tourist Accommodation

In 1998 Swansea was stated to have 652 tourist bedrooms, whilst a further 374 tourist bedrooms were on the Gower. Additionally, a substantial number of sites for fixed caravans and chalets, as well as for touring caravans are provided for. Some 2.5 million tourists are estimated to have spent 5.36 million tourist-days in the area in 1997. In qualitative terms some anomalies are evident; Swansea City has three major hotels of four-star quality, from the Marriott, Forte, and Hilton chains. They have high occupancy rates throughout the year, and do not offer special weekend break rates. The city has no five-star hotel. Modest, small B& B hotels on the seafront are in lower price categories. Fairy Hill Hotel on the Gower is the only high-quality hotel in that area - other accommodation there being mainly guesthouses, self-catering, or serving the caravanning market.

Tourist Event Strategy

Swansea is trying hard to find an appropriate image, and has to date tried to market itself as a multi-functional tourist destination, with immediate access to a quality rural environment. It has also had an events programme, and development strategies. It has not published estimated numbers of those attending planned events. The Literature Festival of 1996 emphasized the importance of *Dylan Thomas*, and such theming is now being used to encourage international tourists to visit Swansea. Since 2000, CCS has also developed a summer long Swansea Bay Festival, which has used European Union marketing funds to promote it.

The short-stay market is being nurtured because of the availability of higher quality chain hotels in the city. The business tourism market is deemed to be buoyant and successful due to quality small-conference/meetings facilities in the urban hotels, and further potential is recognized in this field. 'Adventure Activities' are also now being marketed, in the short-stay category. Such developments reflect WTB strategic influence on management and marketing.

New Products

There are four new tourist products being developed in Swansea:

1. Swansea's diverse and Multi-Attraction Image is now being given an additional cultural skew - birthplace of writer Dylan Thomas, success of the Year of Literature, and new museum developments. To reach a critical mass of attractions, the Millennium Botanical Greenhouse - 20 miles west, will be marketed;
2. Activity-Sports - sea and countryside within 15 minutes of the city centre, will be capitalized upon and marketed;
3. The Conference and Meeting Market will be targeted, especially for company conferences and other small-/medium-scale meetings, which give high hotel occupancy rates, and high spend.
4. The Short Break Market is also being targeted, linked to the above three themes.

As can be seen from the above review of Swansea's tourism product the notion of niche markets within the Swansea destination has not been clearly identified. The start of the niche product seems to emerge in connection with Dylan Thomas and a consultant's report commissioned in 1998. Since 1988 these niches have started to emerge as important strategic elements, specifically Dylan Thomas and The Swansea Bay Summer Festival. This seems in keeping with the National Tourism Strategies, which, as noted earlier, appear to provide scant comment and incorporation within their strategic documents.

Swansea's Case Studies. The Niche Products of Dylan Thomas and the Swansea Bay Summer Festival

The cases of Dylan Thomas and the Swansea Bay Festival represent the urban niche products and fit into the overall strategy of encouraging and evolving Swansea as a tourist destination. They can be categorized into items 1 and 4 of the new tourism product developments listed above.

CASE STUDY 1 - Welsh Poets: Dylan Thomas

Dylan Thomas is a poet of world renown. His poetry has been described as 'rich in vivid and highly original imagery' and 'technically ingenious, frequently obscure, but highly praised' (Tourism Developments International and Stevens and Associates, 1998, citing Macmillan Dictionary of Biography (1989) : 2). He is also known for his play 'Under Milk Wood', which was broadcast by the famous Welsh actor Richard Burton. He was born in Swansea in 1914 and spent the early years of his life here. He died in 1953, in New York, as a result of alcohol poisoning.

The potential of Dylan Thomas has only now been fully realized and the tourism product is starting to be exploited. The current interest was stimulated by Swansea hosting the UK *Year of Literature* 1995 (Tourism Developments International and Stevens and Associates 1998), which raised awareness of Dylan Thomas. In February 1998, the City and County of Swansea hosted a workshop to discuss the potential that Dylan Thomas held to promote tourism development. This was linked to the literary tourism initiatives now prevalent

throughout Britain, Ireland and elsewhere in Europe (Tourism Developments International and Stevens and Associates 1998; Kockel 1994). The City and County of Swansea have used the product as a means towards a strategic tourism strategy and they have identified a specific number of objectives; namely:

(i) the further development of overseas tourism in the City and stimulating special interest niche markets

(ii) increasing visitor activity to the Council's key cultural facilities, especially the 'Dylan Thomas Centre'

(iii) increasing awareness of the local residents of the literary and artistic heritage of the Swansea area

(iv) the creation of jobs and the stimulation of the economic activity of benefit to the area's tourism and business community as well as the community as a whole' (Tourism Developments International and Stevens and Associates 1998 : 1, 1.02).

For the first time the product is clearly identified as a niche with definite marketing potential, and fits in with the supposition that niche markets are only now really being recognized as having tourist potential. The consultants also note that previous attempts to launch Dylan Thomas as a tourism product had failed in the late 1970s and mid 1980s but they now consider the time to be right to take advantage of this potential. They cite the reasons for the failure as being *'non-strategic, fragmented and lacked resources to sustain local initiatives'* (Tourism Developments International and Stevens and Associates 1998 : 11 3.03).

The importance of this niche product for Swansea has now been fully recognized and within the context of the new five-year strategic plan for Swansea (CCS 2000b : 18) it states *'The Dylan Thomas association has been identified as a platform for tourism development for the Area and a report on the opportunity 'Dylan Thomas, The Basis for a Tourism Strategy for Swansea' was adopted by the Council in 1998. This product involves both product development detail (acquisition and development of additional related product, themed trails, the Dylan Thomas Festival etc.) and considerable investment in marketing and is expected to have a strong influence on overseas visitors to the area.'* In addition one of the key strategies and actions will be to *'promote the area as a cultural tourism destination...the Area's primary assets - developing the Dylan Thomas' 'product' and the proposed Maritime Museum'* (CCS 2000b : 36).

As Kier (2000) states *'Swansea doesn't sell Dylan Thomas, Dylan Thomas sells Swansea. Every time Dylan Thomas is cited in newspaper articles and the media Swansea is effectively being marketed'*. In terms of uniqueness and specialism Dylan Thomas is a fine exemplar and fits neatly into the concept of an urban niche product. *'Today Dylan Thomas' work through the medium of print, radio and film is enjoyed world-wide by a huge audience'* (CCS 2000a) and the countries that Dylan appeals to are also those that are strategically identified by the BTA (British Tourism Authority), namely, North America and Japan, which are effectively large markets with the potential for expansion. The importance of Dylan to the image of Wales is realized by the Wales Tourist Board (WTB), who use images of the boathouse where Dylan spent many of his latter years. As argued earlier this supports the notion of a niche product creating an image rather than a destination creating an image for the niche, although the importance of his contribution is somewhat over looked within the content of the WTB's strategic document *'Achieving Our potential'* (WTB 2000). However, broader frameworks are discussed and suggested such as the statement that *'The arts can be used as*

symbols of innovation, creativity and energy which connect with the concept of Wales as a forward looking country.' (WTB 2000).

Further support for this assertion can be found within the strategic document of the Department of Culture, Media and Sport. As mentioned earlier, niche markets are cited but a full and definitive discussion is not present, although there is a link to cultural tourism through *'the development of innovative niche markets, such as film tourism and sports tourism, to unlock the full potential of Britain's unique cultural and natural heritage'* (DCMS1999 : 5).

In celebration of Dylan Thomas, Swansea holds a festival each year which is seen as an important tourism product. This is held in the shoulder period of the season in order to improve the seasonality of tourism within the area. Hoteliers also recognize the importance of Dylan Thomas to the area and the potential that his name has to bring in money, but are not making the most of the product. However, this is also due to the lack of development of the product. As the strategic report states: *'Indeed only one oblique reference was made to Thomas. This appears in the Forte Leisure Breaks brochure and refers visitors to the Dylan Thomas Centre.'* They further add *'Interestingly one hotelier commented that 'North American tourists arrive in Swansea expecting it to be awash with memorabilia'* (Tourism Developments International and Stevens and Associates 1998 : 14, 3.23).

The current product development of Dylan has been based around a number of key rubric combinations which include the superstructure of the:

- Dylan Thomas Centre where a permanent exhibition is now housed;
- Dylan Thomas Ale, Buckley's Beer;
- the Boat House at Laugharne;
- Cwmdonkin Park;
- 5 Cwmdonkin Drive;
- No sign Wine Bar, Wind Street;
- the Antelope Public House Mumbles;
- the Uplands Tavern;
- Rhossili (Tourism Developments International and Stevens and Associates 1998 : 9, 2.31).

It is also interesting to note that the most visited part of the City and County of Swansea's website is Dylan Thomas. It is found on the home page and further illustrates the importance of this niche product.

Dylan's Current Market

In keeping with the character of niche markets this product is highly specialized and focused. It does not have wide market appeal. However, the available statistics relating to the consumption of Dylan Thomas remain very sketchy and lack any economic depth. The following statistics provide a guide for the current product:

Table 1

Dylan Thomas Visitor Profile

Dylan Thomas Centre	
*Total Number of visitors per year	40,000
Visitors to exhibition	15,000
Dylan Thomas Exhibition	
Visitor Origin**	
Wales	48%
England	20%
Long Haul	17%
Western Europe	10%
Others	5%

*most are for conferences unrelated to Dylan Thomas in 2000

** from visitor book in 1998

It is evident that more research is needed to explore the motivations of these visitors, and in particular the international visitors who are going to provide high economic returns for the local economy.

Authenticity and Market Development

This raises issues of niche product development and how the product should be evolved and managed. Clearly the current product is highly selective and has only a limited number of visitors. In terms of presentation the product is said to exhibit authenticity, which might well become lost with further development of Dylan. Kier (2001) purports that the current success is based upon the product being evolved from an *arts basis* rather than a commercial/tourism basis. There is also a personal and individual touch to the product due to the small market uptake. This means that individuals can be taken on a tour of Dylan's sites and be shown authentic situations such as his house. There is a concern to present an objective image rather than a sanitized and entertainment image, which is so evident within post-modernist society. Kier's (2001) concern is that if the product is controlled by the Economic Development Department of the Council then this 'reality' will be lost in a new representation of the tourist product, which will be overtly consumer-based.

Currently the niche market appears to be represented by tourists who want to 'get close to the man' by touching and seeing his sense of place (Kier 2001). The only visible images of the product are found at the Dylan Thomas Centre where there is a permanent exhibition and a statue of him within the contingent Marina Development. Kier (2001) also feels that one of Swansea's cultural products is clearly literature, with Dylan Thomas being the central icon.

This is no different from other literary tourism places such as Stratford-upon-Avon where the central character and tourism icon is William Shakespeare. However, the Shakespeare product has been highly commercialized and its authenticity lost. Kier (2001) supports this by commenting '*that to approach the tourism product solely from the aspect of tourism is to create a flawed product.*' He suggests that the current success of Dylan within Swansea is the result of a focus on literature and the works of Dylan rather than the idea that Dylan can be exploited for the benefit of Swansea. This suggests a reassessment of the current strategic strategy for Swansea to understand how the product will change if the objectives are met.

There is also a certain irony to Dylan's fame. Wales is keen to increase the number of people speaking Welsh and Dylan is famous for his use of the English language. This again suggests conflict with certain marketing attempts to produce the image of a Celtic product.

Dylan Thomas' Conclusions

The product is an example of a niche market. It fits into the concept of a niche namely being highly specific, highly selective and highly focused. In addition the product is unique, as Dylan was born and raised in Swansea. As a result of the product's unique character, Dylan Thomas can be marketed without the need for an inherent destination image. Dylan Thomas sells Swansea, Swansea doesn't sell Dylan Thomas (Kier 2001). This challenges the current thinking on tourism development suggesting that destination image is of minor concern and not contingent on the tourism image of Swansea.

The uniqueness of this niche provides a new strategic opportunity for Swansea. This has only recently been realized, with the inclusion of the product as an important element of the Five-Year Strategy Plan (CCS 2000). The development of the product also links with the strategic policy documents of the WTB and the DCMS. These give encouragement to culture and heritage tourism, together with niche developments. The product is aimed at moving away from current declining long-stay markets, towards the growing short-stay and international markets.

Dylan Thomas is also recognized as being a potential economic earner, able to benefit local economic activity and provide employment. The rationale behind this seems to be focused upon the potential to expand the North American market, which is considered to be extensive. It also facilitates growth in the domestic short-stay and weekend markets.

However, the proposed future development for the product raises a number of controversial issues. The new development policy of this product suggests further commodification, which seems reasonable, in terms of expanding the product's economic base. However, further commercialism also has the potential to acutely change the product's image and delivery, which could invalidate the authenticity of the product and its current market. If the authenticity is an important motivator for the product, then this change may damage its potential expansion by reducing the tourist purchase and motivation of current customers.

Dylan Thomas' strategic advantages are the result of efforts of local actors. Currently there appears to be a need for the WTB, BTA, and DCMS to take a more active interest in the development of niche products. These organizations give scant reference to niches and appear not to fully realize the potential that these markets have. As demonstrated with Dylan Thomas a niche market doesn't have to be small with minimal economic advantages, but can tap into

‘world-wide markets’ with possibilities of further market expansion e.g., Dylan Thomas and the North American market

Lastly, to be successful there is a need for all tourism actors to co-operate in the development of a niche product. The efforts of a few local actors will not result, necessarily, in the development of niche products. As with Dylan Thomas, attempts were made to launch the product on numerous previous occasions without success. It was only when the fragmented nature of the effort became a cohesive force that the niche started to emerge.

CASE STUDY 2 - Welsh Festivals: The Swansea Bay Summer Festival

Throughout the 1980s and 1990s, Wales has been host to a multitude of events that have aimed to entertain the local community and also attract potential tourist interest into specific Welsh localities. Since the decline in heavy industry post-1950s, many Welsh towns and cities have tried to use tourism as a major tool for investment, not only from visitors but also commercial investors. For example Stockdale (1992) has stated that Wales has a long tradition of festivals, especially the Eisteddfodau, which have helped sustain the distinct culture and language of the country. In recent years, however, there has been increasing recognition of the tourism potential of events in Wales and Stockdale goes on to suggest that festivals in Wales can be a potent and powerful force for a community’s economic re-development (Stockdale, cited in Parry 1992).

This is a general context that has been recognized by the Welsh National Assembly. For example the First Secretary has stated that *‘The National Assembly for Wales recognises that tourism is one of the largest and most important industries in Wales. It makes a major contribution to our economy, supports many thousands of jobs and provides income to a wide range of businesses and services throughout the country’* (Morgan, R., MP, Tourism Strategy For Wales 2000).

The idea to coordinate and host an all-encompassing festival to stimulate increased tourism and leisure revenue in the City in order to offset past failure and help sustain tourism development, was proposed by the local authority in the late 1990s. In this context the aim of the Swansea Bay Summer Festival was to create one single, seasonally stretched, festival event rationalizing and drawing all the season’s events together under one heading, better timed and solidly marketed. The philosophy was one which aimed to tackle previous problems associated with poor co-ordination, poor attendance and economic marginalization or failure of past events. In this respect much past criticism has often been levelled at poor marketing and poor event timing, sometimes creating an absurd situation where events have clashed with each other (Festival Funding Application 06/99). As a consequence a proposal for the Swansea Bay Summer Festival project became the centre of a local authority £0.75 million objective 2, European Regional Development Fund application in 1999. Figures are outlined below:

Local Authority	(£94,600)
Private sector (sponsors)	(£314,000)
Local Community Council	(£10,000)
E.R.D.F.	(£342,900)
TOTAL	(£763,500)

(Dicks, M. 2000)

The economic benefits were the main drive behind the festival ethos, and a proposal was made for a partnership between the Wales Tourist Board, the City Council and Swansea, Mumbles and Gower Tourist Association, linked to local regional and national tourism strategies. In this respect the festival was planned in conjunction with the Tourism Strategy for Wales - 2000. The social aspect of the application was also emphasized, with direct reference to the need of making the local community more aware of the entertainment available in the immediate area. The festival also aimed to fully realize the need to produce a programme with a wide range of activities catering for a broad spectrum of ages. This re-affirmed sentiments by Teulon (1991) who stated that events should, where possible, provide something of interest to all ages, and be prepared to cater for the family unit (Teulon 1991).

In the first year of the festival (Summer 2000) it secured twelve major sponsors and attracted some 250,000 visitors to over seventy-five events. In this respect it was generally hailed as a success in terms of visitor numbers, and the large-scale advertising campaign that took place over the festival period. The results that have been obtained from the various customer surveys have produced positive outcomes, leaving a positive social perspective of the festival. The Festival Committee undertook a survey of event attendees at varying events: At that time Evans (2000) stated that the Swansea Bay Summer Festival produced positive feedback from the visitors with 33 per cent of visitors coming from outside the county border and that feedback from those who attended was generally favourable with many stating that the events were well organized (Evans 2000).

Clearly in its first year the festival has been generally perceived as a success in the eyes of organizers and sponsors. Using STEAM (Scarborough Tourism Economic Assessment Model), Swansea City Council released figures for July (2000) stating a 10 per cent increase in tourist visitor figures compared with the 1998 numbers. However feedback from the business participants was less focused or comprehensive.

Qualitative Analysis of the Swansea Bay Summer Festival 2001

Qualitative research was undertaken (Toomey 2001) to further evaluate the effects of the Swansea Bay Summer Festival. This qualitative research was intended to explore at a more in-depth level festival issues that could not be addressed by the previous visitor survey used by the festival marketing team. The research focused on the business community and aimed to evaluate the contemporary management issues that challenge the future organizational framework and planning for the festival. An initial sample size of fifteen key businesses was chosen, from approximately fifty key business enterprises within the local area. To locate an informed choice of research interviews, the Swansea, Mumbles and Gower Tourist Association (SMGTA) members were used, with an intention to facilitate a research model aimed at 'snowballing' (Taylor and Bogdan 1984). The research concentrated on four key issues or objectives, which included:

- to evaluate general attitudes to the festival;
- to determine general attitudes to local tourism planning and development;
- to evaluate the festival in terms of effects on local business;
- to evaluate and synthesize perceived future festival needs and opinions (Toomey 2001).

General Attitudes to the Festival

Generally the return for festival awareness was positive. All but two of the respondents knew what the festival aims were, and what the programme of events involved. Every one of the respondents was positive in reply to the festival, many pointing out that the event raises the profile of the City, giving visitors something extra as an attraction. *'The whole idea raises the perception of Swansea, not only from the visitors' point of view, but also from a local person's point of view...it's a super event, there are things going on during the summer, which does attract tourism into the area'*. (Toomey 2001). There was also a strong belief that the festival structure had been a well thought out process that reached out to all ages of the population spectrum. *'The content of the festival is comprehensive, it covers everything...I thought it was a really good idea'*. (Toomey 2001). There was only one negative point raised about the festival in general, that being the lack of indoor facilities, although other respondents mentioned this in further questions.

There were also strong responses in favour of more advertising. All the interviewees believed that the future of the festival was one of success, but outlined certain constraints that needed to be adhered to. These included continual improvement and tackling complacency *'I think it will be successful, yes, definitely. It's got to be really. They have got the money to put it on, it would be a shame to see it go...you have to keep improving things'*. (Toomey 2001).

The Festival and General Tourism in Swansea

Over half of the respondents believed that there was not enough effort made in regard to co-ordination and communication from the various bodies involved within tourism. *'Within the city council there should be more consultation...There needs to be council co-ordination'* (Toomey 2001). Others also pointed out problems with the current communication channels, raising issues about the lack of representation in the industry. *'What is worrying is that the council communicate through the association (SMGTA), but the membership is not representative of the industry...it's a communication problem'* (Toomey 2001). It was not only the council and SMGTA that were deemed questionable; the Wales Tourist Board also came in for criticism by many of the interviewees, *'I don't think that the tourist board do a good job for us at all. They are not positive enough...They really need to be more aggressive and go for it'* (Toomey 2001). This view was not shared by all, others raised issues about the need to increase advertising of the city outside of Swansea, again referring to an insufficient effort made by the council and the Wales Tourist Board. Once again there were references made about the lack of indoor facilities within Swansea, and also the need to change the attitude of the hands-on workforce within the industry through an increase in customer care and values. Some of the interviewees responded to the state of Swansea in a negative manner, particularly with regard to infrastructure. *'The Main concern I have with tourism is the state of the town...The council really needs to get its act together in that respect before they start inviting people here in a big way... The main people - being the council - have got to realise that they can't put a few flags out, without really consciously taking a look at the way people see the town... Swansea hasn't addressed the problem. The festival has been well organised and well run, but they need to go on the back of a better Swansea'* (Toomey 2001). Interviewees in Mumbles also raised infrastructure issues, although the replies were more positive due to the various new improvements within the village. Responses were mixed on whether the festival had made a contribution to increased tourism from a general perspective; many thought that it was only in the day visitor market, or just for local people. There was optimism from most

respondents that there would be overnight stays in the future. Other replies were more positive, believing that the festival had some effect on tourism, although there was some vagueness on tangible measurement.

The Festival and Local Business

Interestingly under this particular area of the research only one third of the replies stated that the events at the festival had a positive effect on sales and bookings. Many of the responses were unsure that the festival had any extra growth in business, believing that they would be full during the seasonal period without the festival. The larger 'chain type' establishments believed that they had felt a positive effect due to particular events being held during the season, the small to medium establishments had mixed opinions. *'No effect as yet, no one has said to me I've come down because the festival is on'* (Toomey 2001). This is in contrast to the opinion which stated that *'Oh definitely positive. I think it has encouraged more people to visit the area, because it gives them an advanced package...it gives them an extra reason to stay...It's a very good tool'* (Toomey 2001). Generally, however reactions were mixed, but there was a stronger belief that the festival kept clients in the area for longer. Others did not realize the knock-on effects that the festival had provided in terms of extra income through event performers and production stays.

The Festival Tourism and the Future

The interviewees responded in a unanimous fashion for a continuation of the festival, due to the positive effects that it had on Swansea, although most stated that there was a need for continual improvement *"Well I think it should go on, and it should go ahead, I think it's a positive thing for the city, it can only be. I think it has to grow and move with the times, it can't become stagnant, that would be a shame"* (Toomey 2001). A few replies also expressed a need to increase the number of activities, and make the festival boundaries more wide-reaching, *'Hopefully it will get better, there must be one or two community events that could join in - I know it's called the Swansea Bay Summer Festival, it could be more wide-reaching and incorporate things on the Gower'* (Toomey 2001).

Seasonality was also an issue raised, some respondents highlighting the need to move the large events away from bank holidays, pointing out that they can fill to capacity without these events, *'Keep events away from bank holidays, I know there will be events, but not the large ones. It would help us with planning'* (Toomey 2001). Others believed that they could either extend the festival period, or create a 'Winter Festival', to help combat the seasonality problem. Over half of the respondents believed that there needs to be better coordination and communication between the tourist organizations, and a stronger advertising campaign to promote not just Swansea, but also Wales. Importantly, other interviewees raised issues about the poor condition of Swansea's infrastructure, including the condition of various properties, and the lack of general maintenance to public areas, *'There are still knocked down buildings in the village...I still get people saying 'It used to be lovely down here, its gone a bit tatty now'* (Toomey 2001). . The importance of visitor impressions was also emphasized, *'The state of establishments along Oystermouth Road. They are seen as not very presentable...I think it can give the wrong impression. First impressions set into peoples' minds is very important'* . Others commented about the heavy drinking atmosphere within the City at the weekend, once more creating an unsavoury image for the visitor (Toomey 2001).

Festival Conclusions

In conclusion, it can be seen from the results that perceptions of the Swansea Bay Summer Festival, in its current form, generally provide a valuable contribution to niche tourism development in Swansea. These are sentiments that are illustrated by local authors and the local press such as (Dicks 2000; Cavill 2000; Greaney 2000; Rees 2000 and Vincent 2000) and are very much in line with authors highlighted earlier in the paper such as Richie (1996) who emphasize the economic importance of festivals in an urban locality.

The festival has been perceived by all respondents as a positive event for the city, although the actual revenue created appears, at best, small with no clear geographic or capacity-related pattern emerging. In this context the festival appears to keep the visitor in the Swansea area, rather than attracting tourists to Swansea, specifically for an event. The Swansea Bay Summer Festival's main objective is tourism growth, but community participation is also deemed as an important component and this concept has been particularly supported by authors such as Getz (1991) Teulon (1991). However, this has revealed a number of problems within the promotion and organization of the festival. In this respect Getz comments that '*There will often be fundamental differences in goal priorities among different levels of government, governing bodies, and individual events, these have, in the past, had a detrimental effect on promotion of an event...a bottom up or community-based approach is recommended*' (Getz 1991). Clearly the message is one that encourages more communication and community involvement. This method of approach, combined with the festival management should go some way towards encouraging a shared goal objective, rather than the confused mixed message currently portrayed. This mixed message is one that all respondents showed signs of being aware of, many stating that they are ill-informed, and thus fearful of festival failure due to poor communication, again sentiments that have been expressed by authors such as Watt (1998) on these important aspects.

It is perhaps of more strategic significance, however, that the results have generally highlighted a deeper, underlying problem in achieving sustainable tourism within Swansea and the surrounding area. The main issues appear to be problems associated with poor infrastructure provision and the environmental or physical condition of the City, again issues supported by such authors as Hughes (1993) and Mules (1994). All responses have pointed out, to a greater or lesser degree, that the City requires investment in visual presentation and further efforts in planning in order to obtain a continual increase in visitor returns. This deeper issue appears to be fundamental as the key to an increased tourist vision within the City. For example rival cities, such as Cardiff, have heavily invested in regeneration and urban infrastructure and in turn appear to have benefited from increased visitor rewards. It is a lesson that Swansea needs to adhere to, if increased benefits from tourism development within the City are to be sustained.

In summary, evidence suggests that festivals can be used as a tool to achieve numerous positive tourism goals for Swansea and this is very much in line with published literature such as Hall (1992). Clearly, from early evidence, the Swansea Bay Summer Festival has had a positive start, and both primary and secondary data have given rise to some positive feedback. Although in its infancy, research issues have been highlighted at both micro and macro levels which, however, require further consideration in order to sustain the perceived ongoing success of the festival in the future.

The Swansea Bay Summer Festival provides both a positive image and a catalyst to sustain successful tourism growth markets within the City. However results and feedback suggest that the festival should not be seen as a panacea for developing tourism. Clearly results

and comments suggest that priorities should concentrate on the broader development issues that promote the effective strategic planning and long-term regeneration of the City, which in turn will ultimately provide a firm foundation for the continued success of tourism growth. These are sentiments not only conveyed by the contributors to this research but by authors such as Mules (1993) and Hughes (1993) who provide a wider academic argument for this longer term strategic approach.

Overall Conclusions

The paper demonstrates the importance of niche markets for new developing tourism products. The term niche appears to have changed over the last ten years and still lacks a coherent definition, which has produced, to some degree, different understandings especially when comparing a niche with a segment. This confusion and hesitancy is conveyed by strategic documents of National Tourism Organizations (NTOs), where niches are barely mentioned or recognized.

The Swansea niche markets also illustrate the importance of urban cultural tourism to destinations, and are particularly important for destinations which need to move from declining tourism markets such as domestic long-stay, and towards growth markets such as short-breaks and international tourists.

The Swansea case study illustrates two different kinds of niche development, which have different implications for tourism in Swansea. However a number of general issues can be cited. Both cases produce a positive image of Swansea and enhance the destination development towards new products and are seen as useful catalysts for new tourism markets within the City. They also demonstrate different types of strategic planning. The Swansea Bay case is a useful community resource within a tourism marketing framework, but cannot be used as a unique selling product for the destination. Its existence is dependent upon other destination factors such as the image, ambience, infrastructure and superstructure of Swansea.

On the other hand the case of Dylan Thomas reverses image creation, it is a unique niche, with significant potential. It doesn't necessarily require a substantial tourism investment. In fact this niche can be used to create an image of Swansea and Wales as demonstrated by both the CCS and the WTB. Both use the product to enhance the image of the destination. Consequently Dylan Thomas is an important strategic instrument in developing new tourism with Swansea.

The Swansea niches have been initiated at the local level with some tacit support from the WTB, and financial support from the European Union. However, the current strategic advantages are not fully recognized by the UK NTOs. This may be due to problems of definition and the changing characteristics of niches over the last ten years. Based upon the Swansea case study there is clearly a need for NTOs to be more specific in aiding their developments. Tourism niches clearly have the potential to capitalize upon the current splintering of market segments and may well play a far more significant role in tourism's future developments.

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The Role of Cultural Heritage in Tourism

Vesna Borković-Vrtiprah and Ivo Ban

Summary

The kind of potential that Dubrovnik's tourist supply offers should be made better use of, as Dubrovnik, with its attractive natural and cultural rarities, has the possibility of achieving appropriate originality and variety in comparison to competitive destinations. International trends indicate that the most promising tourist destinations are multi-faceted centres combining historic and cultural attractions with natural resources that can support a wide variety of different tourist activities. In terms of heritage, and despite the fact that Dubrovnik only receives a small portion of the total European cultural tourism market, Dubrovnik can offer a significant potential founded on the diversity and richness of its historic, monumental and artistic resources. Even under existing conditions, culture is an important segment of the tourist supply in the Dubrovnik area.

In future, culture should take on a more significant position in the tourist supply of Dubrovnik. Marketing activities should be directed towards this objective. This would contribute towards the quality of the tourist supply and would in significantly greater measure upgrade the value of the historical and cultural heritage. In this way, a new development concept of Dubrovnik tourism would have a realistic and stronger basis and a greater chance of overcoming the present mediocrity. Dubrovnik must become competitively viable, especially under conditions of globalization, and in this respect culture is a great advantage for Dubrovnik. However, it is not enough to just have culture at one's disposal; cultural attractions need to be managed with expertise and long-term know-how. Only culture that is treated as a function of tourism in the highest measure possible can give the maximum economic effects.

Introduction

World Heritage Sites include many of the planet's most outstanding attractions and grandest monuments of the past. They act as magnets for tourism promoters, while they serve as icons that continue to influence current value in the nation in which they are found. They are a treasure in the fullest and deepest sense. There are two main categories: man-made sites and natural sites. The former are often referred to as cultural sites, or historic sites such as Dubrovnik. They include archaeological sites, ruins or intact structures still in use today or adapted for new purposes. In contrast to natural heritage sites, cultural sites contain the physical evidence of human creativity or serve as mute witnesses of major historical events. They record

momentous achievements and put visitors in direct contact with an otherwise invisible past. (WTO 1993).

Tourism and culture have always been closely linked in Dubrovnik. Dubrovnik has always been an important destination for those attracted by its rich cultural and historical legacy. Art, culture and history are important motives for some people visiting Dubrovnik. However, until recently, not much has been done by the authorities and the industry to make the impressive stock of cultural and historic resources accessible. The goal of this paper is to analyze the current situation in order to obtain a base from which to commence forming strategic choices in furthering the development of tourism in Dubrovnik.

Tourist Traffic in Dubrovnik 1985-2000

Already before the war and its devastations, Dubrovnik's position on the international tourist market was weakened as a result of the general economic conditions within the country and the decline in product quality as compared to the demands of the contemporary tourist. The interest of potential tourists for the classic holiday of sun and sea that was offered declined all the more. In creating the tourist supply, numerous errors were made, blindly imitating other popular countries where the so-called tourist industry model prevailed and because of unconditionally accepting the development of a product which catered to mass visitors. Investments were directed towards the construction of large accommodation capacities, which contributed significantly to the rapid development of 'mass tourism'. These kind of tourist complexes were able to secure their market position only through collaboration with large tour operators, who crashed product cost, thereby enabling the sale or purchase of such packages by the low wage-earning segments of the population (Pirjavec 1997). Activities outside of room and board packages were neglected due to the one-sided pattern of development, such that basic expenditures dealt with the cost of accommodation and food, amounting to 83% of average daily expenditure (TOMAS 1989). There were no new components to the tourist supply, which along with the already mentioned product weaknesses, relatively poor quality of service and the absence of many market items, all combined in complicating the market position of Dubrovnik.

This situation was further impeded by the aggression of war, process of transition and other kinds of problems that occurred along the way. It is how we find ourselves today at the starting line, a time when we have to come into serious conflict with the attributes, tendencies and consequences of mass tourism.

Namely, war in the early 1990s almost completely wiped Dubrovnik off the domestic and international tourist charts. The proximity of the front lines and resulting traffic isolation affected tourist traffic such that it was almost absent. This resulted in the catastrophic decline of tourist traffic and tourist expenditure. In such circumstances, during the war year of 1992, tourist traffic showed only 4,008 visits and 14,631 nights, which is only 0.5 per cent (visits), or rather 0.3 per cent (nights) of the traffic registered in 1989, that is, the last year of 'normal' business conditions.

There was a barely noticeable growth in tourist traffic in the period of relative peace (1993-1995). It was only in the relatively peaceful year of 1996 that tourism returned more intensely, which was followed by an even higher growth in 1997 and 1998. However, the average for these two years is only a little greater than a quarter of the total nights and somewhat more than one third of the foreign tourist nights noted in 1989. In 2000, there was a

rise in tourist traffic, especially foreign traffic. Half of the pre-war foreign visits and nights were realized in this year (Table 1).

Table 1. Tourist Traffic in the Dubrovnik Area

Year	Domestic tourists				Foreign tourists			
	Visits (000s)	Index	Nights (000s)	Index	Visits (000s)	Index	Nights (000s)	Index
1985	356.4	99.2	2,213.9	106.5	548.7	117.6	3,654.3	114.9
1986	346.0	97.1	2,069.0	93.5	505.4	92.1	3,455.9	94.6
1987	348.0	100.6	2,003.4	96.8	544.6	107.8	3,492.3	101.1
1988	316.2	90.9	1,806.9	90.2	537.9	98.8	3,314.1	94.9
1989	315.8	99.9	1,830.1	101.3	489.6	91.0	3,068.7	92.6
1990	272.1	86.2	1,529.5	83.6	484.7	99.0	2,931.8	95.5
1991	71.4	25.2	312.3	20.4	59.2	12.2	327.3	11.2
1992	2.5	3.5	8.5	2.7	1.5	2.5	6.2	1.9
1993	6.1	244.0	15.9	187.1	3.1	206.7	9.3	150.0
1994	23.9	391.8	96.0	603.8	14.1	454.8	58.4	628.0
1995	23.7	99.2	96.7	100.7	7.5	53.2	22.6	38.7
1996	56.3	237.6	261.7	270.6	39.3	524.0	158.3	700.4
1997	76.2	135.3	343.7	131.3	109.6	278.9	587.4	371.1
1998	77.8	102.1	302.4	87.9	147.3	134.4	825.3	140.5
1999	72.4	93.1	280.7	92.8	123.0	83.5	622.3	75.4
2000	75.6	104.4	276.8	98.6	253.7	206.3	1487.6	239.0

Since 1992 the domestic tourist category is made up of tourists from the Republic of Croatia only, tourists from ex-Yugoslavia are included with the foreign tourists.

Source: Compiled and calculated based on data from: Analiza turističkog prometa na području općine Dubrovnik u 1986 godini (1987), TSO; Analiza turističkog prometa na području općine Dubrovnik u 1989.godini (1990),TSO; Analiza turističkog prometa na području općine Dubrovnik u 1990.godini (1991), TSO; Promet turista u primorskim općinama 1991., Dokumentacija 848 (1992), RZS, Zagreb; Promet turista u primorskim općinama 1992., Dokumentacija 902 (1993), DZS, Zagreb; Promet turista u primorskim općinama 1993., Dokumentacija 932 (1994), DZS, Zagreb, Promet turista u primorskim gradovima i općinama 1994, Dokumentacija 963 (1995), DZS, Zagreb; Promet turista u primorskim gradovima i općinama 1995, Dokumentacija 994 (1996), DZS, Zagreb; Promet turista u primorskim gradovima i općinama 1996 , Dokumentacija 1028 (1997), DZS, Zagreb; Promet turista u primorskim gradovima i općinama 1997, Dokumentacija 1056 (1998); DZS, Zagreb; Promet

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Furthermore, the long absence from and the loss of the tourist market created additional problems. To be precise, it is difficult to erase the 'images of war' from the consciousness of potential visitors and to replace them with positive impressions of a destination recovering from war. Enough time, patience, skill, knowledge and money is required in order to conquer a market systematically, using various long-term marketing instruments (Vukonić 1996).

Dubrovnik's absence from the tourist market reflected itself also on a changed structure of visitors. In the 1980s, the former neighbouring republics showed the highest percentage in total nights (about 30 per cent), including the traditional tourists from Germany (almost 15 per cent), Great Britain (nearly 17 per cent) and other west European countries. Changes in the structure of tourist traffic occurred in the comeback years of Dubrovnik's tourism (1996), or rather the return of Dubrovnik to the international market (1997). Almost 50 per cent of the tourists originated from Bosnia and Herzegovina, Slovenia, the Czech Republic, Slovakia and the Russian Federation, which was especially evident in 1997 (Ban, Borković-Vrtiprah 1997). In 2000, the visitor structure was made up mostly of western European countries. In the year 2000, our traditionally most important generating market, Germany, had a market share of 19.26 per cent, followed by Slovenia with 10.57 per cent, Bosnia and Herzegovina with 10.06 per cent, the Czech Republic with 8.84 per cent, and Great Britain with 8.01 per cent.

The Impact of Cultural Heritage on Tourism

Besides the beauty of natural resources, the preservation and advancement of Dubrovnik's identity must be based on the historical looks of the city, cultural and natural monuments, as Dubrovnik is well known for its culture and curiosities, its long tradition of maintaining the 'Dubrovnik Summer Festival' and other manifestations. In addition, Dubrovnik is an urban centre of the highest value. The Old Town of Dubrovnik was registered as a world cultural heritage site by UNESCO in 1979. The importance of this fact is manifold, as seen from present and future economic, urbanistic, ecological and especially touristic valorizations, as cultural resources have great powers of attraction. The originality, variety and abundance of such cultural structures determine its tourist attraction and increase the overall value of each settlement's tourist supply.

The exceptional potential of Dubrovnik's cultural supply has not as yet been taken adequate advantage of. Vacation and relaxation (91 per cent) and absorption of the natural beauty (39 per cent) are still the main motives for most tourists in coming to this destination, while the main motive in coming for only 26 per cent of visitors is in sightseeing the cultural curiosities (TOMAS 1997). This means either that cultural heritage is inadequately represented in Dubrovnik's tourist supply or that it is insufficiently represented on the international market.

Research that was carried out during 1999 indicates the same situation. A relaxing seaside holiday (64.8 per cent) and the exploration of nature's beauty (35.2 per cent) are followed by such prime motives as the discovering of cultural sights (21.1 per cent) and entertainment (20.3 per cent). Reasonable prices, new experiences, and adventure are equally important motives for coming to this destination (Table 2.).

However, the fact remains that cultural monuments are a source of satisfaction to almost all visitors coming to this region, regardless of their motives. Also, 30 per cent of visitors

consider them an important aspect of their holiday and once visitors find themselves in this destination, they have an unavoidable need to get to know these monuments, even if they actually came to this destination for other reasons. Thus, one third of the total number of visitors desire to transform their visit and sightseeing into a cultural and educational act (Turizam i spomenici kulture ... 1989).

Table 2. Motives for coming*

Rank ^{**}	Motives	Dubrovnik %	Croatia %
1.	A relaxing seaside holiday	64,8	89,5
2.	Exploring nature's beauty	35,2	41,3
3.	Exploring cultural sights	21,1	8,0
4.	Entertainment	20,3	19,2
5.	Reasonable prices	14,8	13,5
6.	New experiences and adventures	13,3	18,9
7.	Sport, recreation and fitness	7,0	10,5
8.	Visiting relatives and friends	6,3	6,7
9.	Business obligations	5,5	1,3
10.	Other motives	5,5	3,1
11.	Proximity of destination	4,7	14,2
12.	Health reasons	3,1	6,3
13.	Shopping	1,6	1,4
14.	Nature walks and hiking	1,6	3,2

*Possibility of many replies.

**Rank according to position.

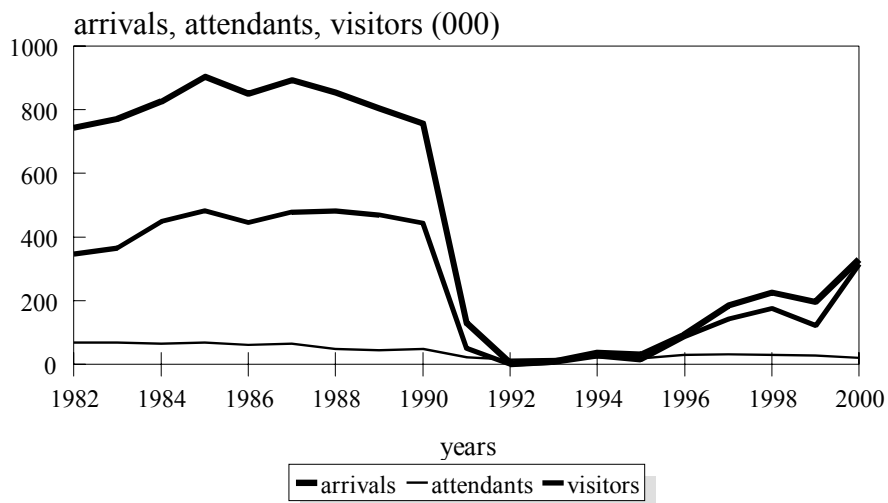
Source: A survey of guest satisfaction in coastal areas – summer '99, Institute of Tourism, Zagreb, 1999

Cultural activity is a significant element in the tourist supply of the Dubrovnik region, shown through an analysis of these two aspects, that is, the arrival of tourists in the Dubrovnik region and the touring of significant cultural institutions in the city of Dubrovnik, which contains the greatest concentration of cultural supply, such as museums, the city walls, as well as musical and theatrical shows during the Dubrovnik Summer Festival held from July 10 th to August 25th each year (Table 3, Figure 1). For instance, it can be seen that there are very strong ties between tourist arrivals in the Dubrovnik region and museum visits in the city of Dubrovnik, of which the most famous are the Museum of Dubrovnik, The Rector's Palace, Dominican Monastery and Museum, Maritime Museum, Museum of the Franciscan Monastery, Treasury of the Cathedral, Rupe Ethnographic Museum, Museum of the Sigurata Convent, Museum of the Orthodox Church, the Synagogue, and the Home of Marin Držić.

The City Walls are one of the most attractive historical monuments of the city of Dubrovnik. The City Walls encompass the entire city and are 1,940 metres long. There are five bastions, three round and twelve square-shaped towers, built between the 8th and 16th centuries. The best-known forts are: St. Lawrence, Minčeta, Revelin, St. John and Bokar. The role of the City Walls in the tourist supply is quite significant, confirmed by the relationship between visitors of the City Walls and the arrival of tourists in the Dubrovnik area.

A similar relationship exists between tourist arrivals and the attendance of events in the Dubrovnik Summer Festival, where the works of Croatian and foreign authors are performed, conducted by both Croatian and foreign performing artists. Each year, the programme includes events covering drama, music and folklore. A variety of dramatic shows are conducted on open stages within cultural monuments of world heritage. The musical programmes (generally open-air and in historical ambiances) include symphonies, chamber music, choirs and solo concerts, as well as operas, ballet performances, dance theatre and midnight serenades. Folklore performances are conducted by ensembles from Croatia and abroad. In the Festival's 50-year history (from 1950 to 1999), 1,740 dramas, 1,892 musicals and 548 folklore performances or a total of 4,180 shows have been held. In the years gone by, the Festival has had more than 2.8 million people attending (Monograph Dubrovnik Summer Festival 1950-1999).

Figure 1. Tourist arrivals, Summer Festival attendants and city wall visitors



Source: Prepared on the basis of data in table 3.

Table 3. Tourist arrivals in the Dubrovnik area and visits to cultural institutions

Year	Tourist Arrivals (000s)	Museum Visitors (000s)	City Wall Visitors (000s)	Summer Festival Attendance (000s)
1982	742.9	365.7	347.6	68.7
1983	771.6	...	366.1	69.1
1984	825.8	...	450.4	66.0
1985	905.1	664.7	482.3	68.0
1986	851.4	...	445.2	61.0
1987	892.6	...	479.9	65.1
1988	854.1	863.6	483.6	48.0
1989	805.4	...	469.2	44.7
1990	756.8	...	443.6	49.1
1991	130.6	66.6	50.2	22.4
1992	4.0	...	-	14.7
1993	9.2	...	8.4	16.3
1994	38.0	32.1	28.3	22.1
1995	31.2	...	15.6	19.7
1996	95.6	...	86.4	29.6
1997	185.8	57.9	143.1	31.7
1998	225.1	...	175.8	30.9
1999	195.4	...	122.3	28.5
2000	329.3	294.1	316.1	20.5

Source: Ibid Table 1 (for tourist arrivals); Culture and Art, Documentation 527, 633, 754, 867, 975, 1065, DZS, Zagreb, Priopćenje, Posjetitelji važnijih turističkih znamenitosti i atrakcija, broj 4.4.10/1; 2; 3; 4; (2000/2001), DZS, Zagreb, (for museum visitors); Society of Friends of Dubrovnik Antiquities (for City Wall visitors); Dubrovnik Summer Festival (for Summer Festival attendance)

For 1997, an analysis of tourist views and consumption in Croatia and in certain tourist regions indicates that Dubrovnik itself with its historical and cultural attractions contributes towards making culture a significant factor in the tourist supply of the Dubrovnik-Neretva County. The most frequent tourist activities in this region, i.e. tourist destination, were: swimming/bathing (85 per cent), sightseeing the curiosities (50 per cent), touring the region (41

per cent), museum visits (26 per cent), concerts (12 per cent) and theatrical events (10 per cent) (TOMAS 1997).

Future Trends

Although the rich cultural heritage of Dubrovnik is an important competitive advantage in the battle for a share of the tourism market, cultural tourism, as a distinct market segment, is still poorly developed. Most tourists coming to Dubrovnik view culture as only a part of the total tourism product, rather than a primary motivation for visiting the city.

The kind of potential that Dubrovnik's tourist supply offers should be made better use of, as Dubrovnik, with its attraction, natural and cultural rarities, has the possibility of achieving appropriate originality and variety in comparison to other competitive destinations. What makes it different from other destinations is precisely its cultural heritage. There should be an emphasis on this resource as the leading 'product' of this destination. Namely, each destination has a specific 'product' that overlooks others and that plays a major role in attracting tourists. Examples are the carnival in Trinidad, Oktoberfest in Munich, Westminster Abbey and the Houses of Parliament in London, and so on (Heath and Wall 1992).

Today, all European destinations are increasingly emphasizing their historical and cultural heritage. A frequent task of national tourist organizations in the world is the presentation of ones' own culture via tourism. For example, already in the mid-1980s, the British Tourist Organization made use of heritage (Heritage 84) in creating an image of the country (Middleton 1989). In the early 1990s, Italy chose to diversify supply and advertisement (advertisement was expanded to include cultural, congress and health tourism, with a strong accent on all ecological elements). Today, Switzerland promotes cultural tourism through its 'Festival in Switzerland'. In addition, Switzerland Tourism has identified several new niches and has promoted more aggressively established events, collecting them under major categories. Especially of note is the cleverly designed 'Top events in Switzerland', consisting of seven renowned international events: the Montreux Jazz Festival, the Winter Snow Polo at St. Moritz, the International Contemporary Art Festival at Basle, the Gstaad Tennis Open, the Golf Open at Crans Montana, the Classical Music Festival at Lucerne, and the Lugano Film Festival (Marvel and Johnson 1997).

Cultural tourism is viewed as a means of diversifying market demand and as a solution to the problems of very diverse areas in Europe. For traditional tourist destinations that rely on significant tourism flows for their survival, the development of cultural tourism is often a response to the problems of tourism itself - including overcrowding or seasonality.

It is of course possible, for the same historic resources that are used as primary attractions to also serve as secondary attractions for visitors motivated by other tourism or non-tourism attributes of the city. Cities dependent upon quite different primary tourism resources can make use of historic resources as secondary attractions. Many traditional seaside resorts, for example, have felt the need to diversify their beach and promenade attractions by exploiting the potential of their historic resources, especially those related to the sea and maritime activities. In much of the less developed world, the linking of a historic city to beach resorts is viewed as a means of increasing the importance of tourism in regional development, by extending the length of stay, moving 'up-market' to attract higher-spending visitors, as well as spreading the impacts of tourism in space and time. (Ashworth and Tunbridge 2000).

Cultural tourism is therefore changing, both in terms of the way in which tourists consume culture, and in the way in which culture is presented for tourist consumption. Culture is now becoming an essential element in tourism policies at all levels, from the European Union down to the individual municipality. What is essentially new about this wave of cultural tourism development, however, is the fact that culture is now primarily being promoted for economic, rather than cultural reasons.

In reality, 'heritage' in tourism is not only a definition for nature, history, architecture, tradition, etc., that is, inheritance or legacy, such as the values that are carried down from one generation to the next, but rather that which can be emphatically portrayed in the promotion of a tourist destination (Vellas and Becherel 1995). The promotional use of cultural-historical personages, anniversaries of historical events, festivals and so on, in creating a destinations' image, is not only specific to western Europe. Such examples can be found in North America. Heritage has become a commercial 'product' offered to tourists seeking a holiday and experience. Nature, cultural heritage and especially architecture, are the tourist resources of Europe.

Cultural tourism is clearly an important and growing market in Europe. There has been a distinct increase in the visiting of cultural attractions, and in the number of cultural tourists in Europe over the past twenty or thirty years. However, the data indicates that culture is often far more important as a secondary motive for tourism rather than as the prime motivation. Data collected in the current study indicates that the total cultural tourism market, including those for whom culture is a secondary motive for travel, is about three times the size of the specific cultural tourism market. This would indicate a total European cultural tourism demand of about 60 million international trips in 1992 (Richards 1997) The development of secondary general cultural tourism is particularly important in destinations where culture is an essential addition to the basic sun, sea and sand products.

Cultural heritage, along with natural surroundings, is the basis for a tourist supply. The desire of discovering a new culture is almost always on the list of motives that potential tourists have for travelling. The subjects of interest are quite various, covering cultural-historical monuments, art, entertainment, sport, and economic events, etc.

Modern visitors are showing greater interest in package tours that offer elements of cultural heritage, depending on their educational level, income and culture. They want to get to know the local culture and they want contact with the locals. There are fewer passive observers who are tied only to natural beauty, climate and surface impressions. The modern visitor frequents theatres, museums and galleries, art and musical events, is enthralled with the national folklore, goes to festivals, sporting competitions, and finds great delight in the gastronomic culture. All this is considered as life with quality, where culture and tourism are vital factors (Hitrec 1995).

If we take into consideration the main potentials of Dubrovnik's tourist supply and its position on the international tourist market, we can conclude that the leading market group aimed for in the long term for this destination should be visitors with special interests, that is, visitors who seek a combination of cultural entertainment and vacation. These visitors stem mainly from families with traditions in enterprise and management. They visit heritage attractions within the scope of their holiday, even though many of them seek relaxation. Visiting heritage attractions are only a part of their daily activities, in combination with others, such as, for example, visiting restaurants, beaches and so on. This is all only a part of the 'shopping list' of activities, in order of priority, dependent on activities already tried and on actual knowledge of the destination. Enthusiasts or specialists, whose main motive in travelling

is to get to know the heritage, do not make up the dominant market segment of tourists. Visiting and getting to know heritage attractions is characteristic of westerners, tourists from the USA and Canada and is a dominant motive for Belgian and Swiss tourists. It is significant for the inhabitants of England, Scotland, Wales and generally for European tourists, although this does not imply that all nationalities can equally be included in this kind of travel (Prentice 1995).

Directing Dubrovnik's supply towards visitors with special interests would enable the speedier comeback of Dubrovnik to the developed markets of central and western Europe and market positioning in overseas countries. Therefore, cultural attractions must compete not just with other cultural attractions, but also with a wide range of other tourism and leisure attractions. Cultural tourism can make a major marketing contribution in attracting more tourists from abroad. Alongside this market segment, Dubrovnik's tourist product should be directed towards some additional segments, such as: congress and meeting organizers, and business guests.

This kind of concept for the development of tourism in Dubrovnik creates the base for the transition from quantity to a sustainable development of tourism, adaptive to the needs of contemporary tourist demands. Namely, the demands of tourists for conserved environments and unspoiled nature, closer contacts with other people, increased health awareness, entertainment and relaxation, and vacations tied to a wide spectrum of special interests, is all the more pronounced today and will be all the more so in the future (Weiler and Hall 1992).

This demands a well-developed concept for the reconstruction and shaping of the tourist product, and the establishment of a strategic marketing plan. However, developed tourism cannot be expected without substantial support, or rather, encouragement based on the credit and tax policies of the country.

With this in mind, it is necessary to exchange the marketing strategy geared to masses for a marketing strategy with an aim, directed towards a market segment that is strategically sustainable over a longer period of time. A product and marketing mix should be developed, adapted to each selected segment (guests with special interests, congress organizers, business people). Market success will depend on the intensity of how Dubrovnik markets its tourist supply and how precisely it is directed towards appropriate segments.

Conclusion

In terms of heritage, and despite the fact that Dubrovnik only receives a small portion of the total European cultural tourism market, Dubrovnik can offer significant potential founded on the diversity and richness of its historic, monumental and artistic resources. Even under existing conditions, culture is an important segment of the tourist supply in the Dubrovnik area. This is demonstrated by the strong tie between tourist arrivals and the visiting of historical and cultural attractions located in Dubrovnik and the attendance of drama, music and folklore shows during the Dubrovnik Summer Festival.

Dubrovnik has to follow the example of other European destinations, by steering away from mass tourism and by basing its new concept on a sustainable development of tourism. Dubrovnik has the potential for this kind of development, providing that it improves the quality of supply, re-evaluates its historical and cultural heritage, and develops a marketing plan directed towards those market segments that are strategically sustainable over a longer period of time.

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Secrets of Holland

Fien Meiresonne

Common history

The Dutch cities Delft, Dordrecht, Gouda, Haarlem, Leiden and Schiedam have a rich past in which trade and industry, arts and water had very important functions.

These cities underwent a period of strong economic growth in the 14th and 15th centuries. In the 17th century the wealth grew even more. That is why we speak about the 17th century as the Golden Century.

The cities played an important role in the history of Holland. The cultural heritage of this rich past still exists today. In all of these aforementioned cities there are a lot of traces of trade and industry to be found from former centuries.

Each of the cities has its very specific characteristics. Delft is famous because of its porcelain, the Delft Blue Earthenware. Leiden was famous for its textile industry, Schiedam for its distilleries for 'jenever', Gouda because of its cheese and candles, Haarlem had its famous painters and Dordrecht was a centre of the wine trade and a religious centre.

The cultural heritage of each town tells the history of that particular town. Together these stories give a good picture of the growth and wealth of this part of Holland in past centuries.

United we stand, divided we fall

United we stand. That is why six Old-Dutch cities decided in 1995 to start cooperating to characterize themselves as a cultural-historic destination. This was a reaction to the challenge issued to the tourist sector by the Ministry of Economic Affairs as described in the policy plan: 'Entrepreneurship in tourism' in 1993. In this plan, the government challenged the private organizations in the tourist sector to take initiatives for the further development and promotion of the tourist product and to improve tourism management in the Netherlands.

In the first phase from 1995 to 1997 the cities had:

- A centralized project organization;
- A marketing campaign to find the right target group(s);

- The start of structural cooperation in local tourist meetings;
- Marketing-research (0-measurement) in 1995.

A marketing development plan was drafted and the intensified cooperation between the six cities was named **Secrets of Holland**.

The main goal was to disclose the secrets of the history of these six vital historic cities and to show their full richness. 'Secrets of Holland' became a trademark for cultural tourism.

When this process started in 1995 large-scale public-private partnership was a rather new phenomenon in the Netherlands. In 1994 a project bureau was founded and accommodated with the South Holland Tourist Board. It is important to know that in the Netherlands tourist boards have always been private institutions. The first tourist board (VVV in Dutch) was founded in 1889! For many decades (local and sometimes regional) governments decided to invest money in staffing capacity, housing expenses and concrete projects. But the decision-making process was conducted by the autonomous board of the VVV-association. Since 1990 most governments have had to reduce their expenses, which resulted in lower contributions from the public sector. Since then these organizations have had to earn their own income through sales activities, sponsorship, contract relations with tourist entrepreneurs or other ways of fund raising.

The partners in this cooperation were the Ministry of Economic Affairs, the six city councils, the provinces of North and South Holland, the South Holland Tourist Board, local tourist boards and the National Tourist Board. The decision was made to finance the project together.

Main goal of 'Secrets of Holland'

The main goals of the cooperation were strengthening cultural tourism so as to achieve:

- More visitors, increase of spending and longer visits;
- Better use of existing tourist facilities;
- Structural cooperation in tourism.

These goals aimed to improve employment and give more structure for the cooperation between the cultural and the tourist sector. At the same time a structural framework for tourist product development had to be designed.

When the process started initiators hoped to make the project self-supporting in about three years. Self-supporting means: independent from government contributions. This seemed to be impossible. Therefore, it was decided, after two years, to integrate the overall promotion campaign into the existing promotional activities and budgets of the participating municipalities. The project bureau was integrated into the South Holland Tourist Board in the second phase of the project.

Up to 1998 100 per cent of the expenditure of the project bureau was financed by project money from the Ministry of Economic Affairs and the provinces. In 1999, this contribution was limited to 60 per cent and in June 2000 to 20 per cent.

In the second phase, from 1998 to 1999, the following measures were implemented:

- Integration of the project organization;
- Closer cooperation with the South Holland Tourist Board;
- Integration in regular city marketing activities;
- Extra efforts on product development;
- Marketing research (1-measurement 1998).

The results of the 1998 research were the following:

Visitors' characteristics

- Predominantly > 40 years and more highly educated;
- Mainly groups of two (50 – 60 per cent), three or four persons (20 –25 per cent) together;
- 50 – 60 per cent from the western parts of the Netherlands;
- 10 per cent increase in foreign visits between 1995 and 1998.

In the present phase of 'Secrets of Holland' the South Holland Tourist Board has an assignment from six municipalities and six local tourist boards to carry out a general promotion campaign. The participating municipalities have the responsibility for the continuation of the inter-local cooperation. The local tourist boards are responsible for private fund raising. The South Holland Tourist Board is not a competitor for them since they made agreements on this issue.

The six cities have a common image and profile in 'Secrets of Holland'. Together however, they all have their own individual development, historic backgrounds and characteristics. They all have their own specific qualities. During the project it became clear that the cities needed more flexibility for self-promotion under the 'Secrets of Holland' umbrella. By combining their rather small budgets for tourist product development and promotion the cities are able to present themselves nationally and even internationally.

Cooperation is essential

Through cooperation many common products have come into being and much free publicity was acquired. For new projects, project teams were formed from the parties directly involved. The others copied successful products from one city.

In 1995 and in 1998 research was carried out to trace the target groups for culture-history. The expenses for this research could be kept low because of the existing cooperation.

Example of good practice

If walls and facades in old cities could speak, they would tell us very interesting stories. The project **Speaking facades** is an audio-drama on location in which monuments speak about their past. Since 1999 tourists, individually or as a group, can do a guided tour of historic buildings. The product has been developed so far in three cities: Leiden, Delft and Dordrecht. For this project there was also a contribution from the Ministry of Education, Culture and Sciences.

This city walk is carried out in four languages with a route description and a map, an audio-player and special (cheap) offers from restaurants, bars etc. along the route. In this way tourists become partners in the history of old Dutch cities. Background sounds related to the specific place help to step back in history. So history becomes fun. Tourists also receive a booklet with written background information. At the moment two private firms exploit the project 'Speaking facades' in Delft.

Other examples

Sometimes one of the six cities developed a local project, which fitted into the general cooperation scheme. In this context Delft developed 'The Secret of Delft', which is a day trip arrangement for fun and history in Delft. In Dordrecht and Haarlem, a children's city guide was produced for children from 8 to 13 years of age. The other cities are soon to follow this initiative because of its great success. Dordrecht and Delft developed Art routes in which cultural events are sometimes connected with galleries, museums and so on. Several publications have been written on specific items and (historic) events.

Bottlenecks and learning points

Evaluation

Assets (in summary)

- more marketing power, cooperation and communication;
- better range and reach of marketing activities;
- better tourist proposals and image;
- 'free publicity' generated by innovations in the tourist product;
- acquisition of project funds;
- exchange of knowledge, cooperation on local and regional scale.

At the beginning of the project 'Secrets of Holland' cooperation took up much of the energy of the partners. Former competitors were sitting at the same table for the first time! Market-driven thinking was rather new. 'Secrets of Holland' was the first example of this kind. The rather complicated way of new cooperation demanded a lot of energy and adjustment. In the beginning cooperation within the various working groups was difficult. Differences in attitude, in motivation, interest and aspirations for the future had to be overcome. Good will among all partners was there but the staff capacity was often insufficient and the roles of the participants were not clear. Essential was the willingness not only to invest in money but also in time and energy.

The local tourist boards, especially, had difficulties with the large scale of the cooperation. Nevertheless, their local knowledge was and is strongly needed for any further progress.

Evaluation

Lessons learnt

- clear allocation of tasks;
- avoiding rivalry between partners;
- financial means are not enough (broad support is essential);
- acquisition of private funds only for concrete activities;
- balance between marketing and product innovation.

In the third phase from 2001 to 2003 the project will be characterized by the same goals but a different organization:

- decentralized organization;
- coordination by South Holland Tourist Board;
- common marketing campaign;
- separate funding of product innovation.

Private enterprise

When the project started in 1995 private enterprise was involved in Secrets of Holland as a financial participant with an annual contribution for general expenses. After 1997 their contribution was lowered and the participation system was left behind. Private companies are more, if not only, willing to participate in concrete projects as long as they are interested for their own image or public relations.

Finances

- The Ministry of Economic Affairs paid *f* 150,000 in 1995, 1996 and 1997.
- The Provincial Government of South Holland paid *f* 125,000 from 1995 to 1999.
- The Provincial Government of North Holland (only one city involved) paid *f* 50,000 from 1995 to 1999.
- The six cities paid *f* 50,000 from 1995 to 1995, *f* 52,000 in 1998 and 1999 and from 2001 to 2003 they will pay *f* 36,000.
- The six local tourist boards paid *f* 12,000 each from 1995 to 1997, *f* 10,000 in 1998 and 1999 and also *f* 10,000 per year from 2001 to 2003.

Final conclusion

Five years of pioneering has brought great success, which will stimulate the six cities to continue and even intensify their activities to promote the intriguing 'Secrets of Holland'.

This example has been presented in Dubrovnik on the occasion of the Culturelink Seminar in May 2001 to act as a possible example for Croatia. In the author's opinion cities like Dubrovnik, Split, Zadar and maybe Pula could consider thinking and acting along the same lines as has been done in the Netherlands. Maybe it is too early at this moment to start such a complicated way of cooperation but at least the idea can be discussed at an appropriate moment.

Cultural Tourism in Destination: Example of Istria County, Croatia

Lorena Boljunčić

Introduction

The term 'destination' in a tourist sense is first used in the beginning of the 1970s, at first in connection with a tourist site, and then, gradually, it became a general term for a tourist location, region, country or a group of countries, or even a continent. A destination is a group of various resources that make it unique and recognizable on the tourist market. It will, as a sum of different elements in connection with it, become the ultimate reason for travelling. These elements include basic factors of an offer (natural and social elements, as well as communicative and receptive ones), but also the overall image of a destination. Determining a destination as a bigger area than a tourist site ensures certain advantages (Vukonić 1995 : 71). Some of the most important ones are:

- forming a more complex tourist offer for potential tourists;
- better possibilities for creating a tourist identity and image;
- better possibilities for presentation and placement of such an area on the domestic and international tourist markets.

Cultural tourism

Selective tourism marks a new quality of contemporary and future tourism, which is firstly based on the selection of a programme, on the responsible and sustainable attitude of all participants in the ecological, socio-cultural and economic principles of a well-balanced development, the qualitative level of service, the original identity and humanity of the tourist offer, and finally with a desirable and balanced number of tourist and local inhabitants in a certain area (Jadrešić 1991: 36).

Cultural tourism is a type or a segment of tourism in which the basic motive for travelling is a certain cultural event or cultural value. This important market segment primarily includes cultural monuments and cultural manifestations. Some authors speak of inheritance tourism, historic tourism and art tourism (Pančić-Kombol 2000 : 175). Inheritance tourism is based on an interest in the remains of the past in buildings, archaeological sites and other monuments, as well as living patterns, folklore, crafts, customs, religious events, etc. Historic

tourism is focused on learning, while art tourism strives to visit galleries, to take part in art performances and festivals.

Cultural resources become tourist attractive through the process of interpretation, which includes selection and forming (packaging) (Pančić-Kombol 2000: 178), therefore resources themselves are not enough. Selection includes singling out those elements of a cultural tourist offer that can pass the tourist valorization, while forming means making them available in the tourist sense.

Criteria for selection, i.e. tourist valorization may include:

- intensity of attractiveness: international level, national, regional, local;
- seasonality (three months to one year);
- stay and trip characteristics: from one day (visitation) to multi-day (stationary) stays;
- tourist capacity: measured in 'less than 50 visitors at a time or 300 visitors a day' up to 'more than 5,000 visitors at a time or 10,000 visitors a day';
- belonging to a system of tourist attractions: creating an interesting totality for tourist visits or stays (Cetinski, Kušen 1995).

Forming of tourist availability means enabling a tourist attraction for tourist visits, i.e., for its use in tourism by ensuring adequate information, transportation to the locality, marking the path, publicity of the path and the existence of an informational point or printed information near the locality itself (Cetinski, Kušen 1995).

Tendencies, not only in tourism, show that the cultural offer of a certain area is becoming a must of each tourist package, regardless of the degree of interest from the visitors' point of view. In other words, cultural tourism has an impact on the change of the guest structure, and in general on the image of a destination. It is important to stress that culture as well as cultural offer must have its firm base independently from tourism. Respect for traditional values, valorization of cultural inheritance, knowledge of history, literature, language and everything else that makes up culture must be deeply rooted within the local population.

In this case, it will be much harder for tourism to display possible negative impacts on home culture. In other words, a cultural offer in tourism is a form of superstructure on the cultural offer of the area in general.

Istria County as a Tourist Destination with the Emphasis on Cultural Tourism

Tourism in Croatia has built its policy on mass tourism for a long time. Often, this term is confused with huge numbers of arrivals, while actually it is a unified set of features that are offered to visitors. For example, mass visits to Venice are not mass tourism, but cultural tourism. In Croatia, the local values of an area were not respected, valorized or offered. The emphasis was on building hotel accommodation and creating a tourist offer equally for Istria, Dalmatia or Primorje. The distinction between these areas was displayed only in several natural facts, given by the locality where the guest was travelling. The kind of coast line, or existing inherited surroundings such as cultural inheritance (Dubrovnik, Split, Trogir, Pula, etc.), were

taken for granted, with certain individual, sporadic actions which tried to break the monotony of the tourist offer. Strategic and planned concepts were not defined.

Istria County takes up most of the Istrian peninsula and with its different resources creates a rounded entirety of a certain type of tourist destination. Up until the 1990s tourism in Istria was led by the same guidelines as tourism in other parts of Croatia. It was leaning on the sea and developed coastline as the main resource, neglecting at the same time the extremely interesting inner part of the Istrian peninsula. The slow development of selective tourism began in the mid-1990s in Istria. New tourist products are being developed, such as wine roads, agricultural tourism, bicycle tracks; local gastronomy is being improved and promoted.

Istria also possesses insufficiently used resources in cultural tourism. They are being used partially and sporadically, in promoting destinations outside as well as inside. We can say that the resources have not, in general, passed the forming phase, the phase of packaging into a real tourist product.

Further on, we will show in what way cultural tourism can become a relevant factor in the further development of tourism in Istria County in general.

The first important step is to make a deserving selection within the cultural inheritance and already existing cultural events. In order to show the rich foundation on which it is possible to build cultural tourism in Istria, we will list the most important resources (cultural-historic inheritance and cultural manifestations).

Cultural-historic inheritance:

- The most interesting monuments dating back to the Roman era are in Pula: the Amphitheatre, Augustus's temple, the Sergian family triumphal arch and a small Roman theatre.
- The Byzantine era is visible in the complex of the Eurasian basilica in Poreč, which is a cultural monument protected by UNESCO. Of particular interest is the Splendor chamber from the sixth century, which, without interruption until the present times has hosted the bishop's audience. It is the best-kept chamber of this sort in the world, and this information is not well known even in Croatia.
- The Medieval era left deep traces particularly visible in fortified townlets on hill peaks within the untouched landscape, in the small churches containing a series of medieval frescoes, as well as in fortresses.
- The baroque era is marked in the interiors of many churches with a series of representative organs of the Venetian-Dalmatian type.

The resources listed above are only a part of the cultural inheritance in Istria, and some of them are already being used for tourist purposes.

Cultural manifestations are especially interesting from the cultural tourism point of view, because they combine cultural inheritance and cultural programmes:

- Operas, ballets and classical music concerts take part during the summer months in the Roman amphitheatre.
- The Ethno-jazz festival lasts for three evenings in three medieval fortresses. Ethnic and jazz groups from various parts of the world take part.

- The Organ Days are held in several churches on organs dating back to the seventeenth and eighteenth centuries. The most famous European organ players have performed, such as Philippe Lefebvre, the organist from Notre Dame in Paris or James O'Donnell, the official organist of Westminster Abbey in London.
- The International Film Festival has become very well established in a medieval town (Motovun).
- The Grožnjan Cultural Summer, organized by the International Centre for Young Musicians, organizes master courses for different instruments, music and dance workshops and the jazz summer school. Here, the whole medieval townlet of Grožnjan becomes an ideal stage.

The next step in the development of cultural tourism in Istria County is forming or packaging the products. The activities here are pointed towards two important levels:

1. Creating better conditions in the destination itself.
Part of the building inheritance in Istria is still in a neglected state - historic cores of towns, fortresses, medieval frescoes in churches... The Institute for the Protection of Monuments has an important role here and the Conservation Office in Poreč is putting a lot of effort into the conservation and reconstruction of many cultural monuments in Istria. But, what is imperative for their further life and safekeeping is giving **adequate function** to cultural monuments, and this is where Istria County and local authorities should take a more active part. The monuments should also be adequately **marked**, thus creating the preconditions for their use in tourism. Additionally, there is a need to print or **stimulate printing** of different promotional materials (brochures, guides, itinerary suggestions), therefore providing the guests in a destination with quality information. The media are becoming more and more important - the Internet demands a good quality **website** on cultural inheritance and manifestations through direct itinerary suggestions listing traditional cultural manifestations and linking them toward their websites (for example, the Grožnjan Cultural Summer, The Motovun Film Festival, the Polytechnic in Poreč, links to museums etc.). Thus, the guests visiting websites can reach fresh information (when certain events are taking place, etc.). One should especially encourage those events which occur outside the main season, as well as those whose programmes are known in advance in order to use them in marketing activities during fairs. The contemporary approach to museum settings is also important for getting to know better a certain destination and its past. It would be interesting and useful to further connect cultural tourism with other forms of selective tourism, such as agricultural tourism, especially in creating and offering various itineraries.
2. A More Systematic Use of Cultural Resources in Promotion Outside the Destination
Up until now, cultural resources have not, in general, been used systematically, especially in promotion outside the destination. I

mainly refer to the creating of an image of Istria as a destination that is also rich in cultural monuments and high quality cultural manifestations.

In differentiating tourists connected to cultural tourism we can distinguish three main groups of tourists:

- Those who arrive at a destination directly because of culture: sightseeing of famous monuments or being present at cultural manifestations. At present, Istria does not have a large number of guests like these. They are possibly school excursions, organized group arrivals and occasional individual arrivals at a cultural event, such as the Histria Festival (opera or ballet in the Roman amphitheatre). Individual efforts of organizers of cultural manifestations should be **coordinated** and should create an intensive cooperation with the Tourist Association of Istria County, which, in turn, should not neglect such resources in promotions during fairs and the like.
- The second group of guests are those arriving for various reasons (vacation, congresses...), but who choose the destination for its 'culture' image. These guests are also rare in Istria County.
- The third group of guests are the ones that are not acquainted with the cultural offer existing in a destination, but once they enter it, they use it: they visit museums, sightsee the monuments, take part in cultural manifestations. This group of guests is the biggest one in Istria, which demonstrates the lack of stronger promotional and marketing activities in general (in connection to culture) outside the destination. At the same time it is a great opportunity (O - in the SWOT analysis), an omitted segment that needs work.

Certain elements can be used without significant effort and additional investment. At standard fairs one should carefully design a part of the booth that would point to the cultural offer as well. The presentation must be of good quality - use of photographs, videos, sound background, printed materials, genuine souvenirs. Taped material of the main events in Istria during the year should exist, so that it could be used for fairs, representatives of the media, PR agents and tour operators. It is the best and fastest way of introducing the destination and manifestations (maybe a local TV station could be hired to create such a material). One should also buy or acquire a certain number of videotapes on culture in Istria that are already present on the market.

With the help of marketing managers and PR agents we should determine the targeted market for cultural tourism, make contact with tour operators dealing with cultural tourism and get the information to specialized fairs aimed at the source markets of most interest to us. We should generally create better contacts with PR agents, so that they would be sufficiently and promptly informed of cultural events in order for them to release the information both prior to and after the event. (For example, information about the royal organist of Westminster Abbey and the official organist of Notre Dame in Paris playing at the Organ Days remained unnoticed.)

An additional way to promote destinations could be by attending international seminars on cultural tourism. There one could make contacts, so that similar activities could take place in Istria in future.

Conclusion

Istria is most certainly rich in cultural inheritance and traditional cultural manifestations. By creating a new destination image that relies on these resources and by combining these elements with the rest of the tourist offer of Istria County, we will create conditions for a better tourism and for a change in the guest structure, which is especially interesting taking into account sustainable development.

Careful dealing with cultural inheritance must be present even outside tourist frameworks. By reconstructing cultural monuments we are not only creating better conditions for cultural tourism, but are also improving our surroundings.

Through stronger marketing efforts towards the 'outside', we create excellent preconditions for cultural tourism, and as has already been stated, this is an omitted segment that can bring many improvements.

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Cultural Tourism in the Region of Istria: Interregional and International Cooperation

Doris Cerin Otočan

New Challenges for Cultural Policy Development

Not long ago, the cultural policy of the Istrian County was still based on using cultural management solely within the framework of cultural institutions, with the exception of some pilot or mega-projects of wider significance (festivals, cultural performances of the theatre, musical events, dance, visual and film art, and cultural industry).

This is not the case anymore. Istria is a region that follows the latest trends in the modern European fashion of strategic planning in cultural policy using the newest development techniques, as do all the other regions in transitional countries.

By developing new practical disciplines, such as for example the cultural economy and cultural management, when the process of making a 'cultural product' is concerned, the Istrian County applies a model, which branches in three further development directions. In the first place, we are talking about state, regional, and municipal institutions; secondly, about civil society institutions (associations); and thirdly, about private institutions (agencies or companies). By paying attention to and considering the model of global cultural policy, the Istrian region uses a mix of Latin and Anglo-Saxon models which still implicitly include centralization of money distribution with an elevated degree of control, while the cultural segment of semi-public 'foundations' are being sponsored and receive donations with a smaller degree of control. Although the cultural policy of the Istrian County has not yet incorporated the 'liberal model' (a mix of models used by Nordic countries - a model which leads to decentralization of money distribution, its further redistribution being decided by the 'intermediator', i.e. the Arts and Culture Council) it is approaching the fourth global model, the 'regional model' (Switzerland).

'A free, transnational flow of ideas, information, knowledge, people, goods, capital, etc... makes a new economic and overall development direction' (Dragičević 1998), which is the basic aim of every state or region in transition.

In today's economic and cultural environment, the cultural dimension is not managing to succeed by relying only on its own resources. Therefore, numerous development strategies have arisen, such as, for example, a stronger connection between culture on the one side and

tourism and the economy on the other (small entrepreneurship and rural tourism) or traffic connections as vital factors and an obvious direction of Istrian development. Therefore, as a challenge to a present oriented towards the future, it is of enormous importance for the Istrian County to catch up with the newest trends.

Istria - A Tourist Destination Based on Cultural Tourism

Although every tourist stay, providing it is somehow connected to the culture of the specific tourist destination, can be called cultural tourism, it is necessary to analyze the term 'culture' as an 'open' syntagm which also includes the culture of everyday life and behaviour, even the culture of manufacturing the consumer's alimentary and other resources of the destination, a sort of 'culture of the four senses' - sight, hearing, smell and taste.

Coordination of human resources and a thousand-year-old intellectual capital of multicultural and multi-ethnic trained personnel goes hand in hand with the cultural tourism apparatus as a fundamental link in the creative chain. With strategically planned and targeted projects, which have to pass through the 'filter' of trained teams, Istria is a fast developing cultural tourism destination based on a formula with the epicentre named 'culture':

TOURISM - CULTURE - SMALL ENTREPRENEURSHIP

This formula is also mentioned along with the saying: 'It is more important to control and conduct the resources than to possess them' (Pulić and Sundač 1998).

The importance of cultural tourism development in transitional countries is connected with cultural identity which distinguishes traditions and traditional values, the only true values which must not die out on the local level in this era of European and worldwide globalization. Therefore, Istria develops in two different ways: nourishing the acquired but implementing innovative techniques and methods of general development. Istrian cultural identity can be interpreted as merging with intercultural democracy, which is the root of multiculturalism, which in its turn is a connection with various individual globalizations on a small scale.

Later, based on their perception of world trends of development and reproduction of cultural tourism with their positive and cumulative increase in demand, the towns and municipalities enrich what they have to offer with refined and specific projects, which comprise the Istrian cultural inheritance. A large amount of non-quality offer would only leave a negative mark.

In the process of cultural tourism, it is necessary to establish a sign of equality between the native inhabitants - the manufacturers - and the tourists - the consumers or receptors. Considering the increasing growth and development of rural tourism in Istria, it will be possible to realize this all year long.

This is linked with the fact that holidays are not solely to be connected with the summer season any more (it is interesting to point out that in the summer of 2000 there were on average five cultural happenings a day), which refers to June/July/August, nor only to a period right before and right after the high season. Today, there is a trend for holidays 'all-year-long', and this is exactly what suits Istria because along with the sun and the sea it also has a vast number of still unexploited out-of-season resources (wine days, truffles days, days of chestnut gathering, etc... and many winter-time carnivals and book fairs, etc...)

The Istrian region wishes to create selective, even elite tourism in the Istrian inland, but it is also very obvious that the large-scale tourism in the huge hotel complexes on the coast has to be preserved taking extreme care to preserve cultural inheritance. We all know what the consequences of large-scale tourism are (Venice, for example, is obliged to return to selection and elitism in tourism for the sake of its cultural treasure which is silently and slowly being devastated).

It can be said that cultural tourism is a possibility of participation in another culture because it is a sure fact that there are many tourists fascinated by the genuine native way of living and by the culture of living and everyday life of the destination visited. It is as fascinating as learning about new constellations.

Interregional and International Cooperation

In the tourist competition for which the Istrian region is qualified, interregional cooperation by means of concrete, specific projects based on cultural tourism is of great importance (for the region mentioned). There are programmes and projects based on eco-tourism, cultural tourism as well as educational tourism. International cooperation is not to be neglected in any way. As a perfect example of ambience tourism, let us mention the project Water Bridge for European Parks organized by the Labin association PUT which closely cooperates with the Italian region Emilia Romagna. The students of both regions get acquainted with the Istrian as well as the Emilia Romagna region by way of landscape scenery and tradition.

A good example of international cooperation in the domain of cultural tourism is the International Youth Theatre Festival held in Pula. Over forty days, some 300 students of various profiles and backgrounds from all over the world get together.

In order to preserve the connection of Istrian people living abroad with their Istrian ancestral soil, in the year 2000 the Istrian County started the project United Istrians of the World - Terra Histrica. This programme aims to encourage the youngest generation of emigrants to learn about their home country, the hometown of their ancestors, through cultural inheritance and educational cultural tourism.

The Istrian County creates its own cultural tourism development policy, which is very attractive to the tourist-consumer, who, unlike a mass tourist, has a refined and subtle taste in the targeted choice of his/her eco- and gastro-tourist destination with a rich and vast cultural inheritance and unpolluted natural environment.

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Sun, Surf, Sand and Culture – Compatible? Cultural Tourism at Mass Tourism Destinations

Renata Tomljenović

Introduction

Although present for centuries in all forms of travel, cultural tourism emerged as a special form of tourism only in the last decade (Kelly and Dixon 1991; Richards 1996). Its emergence is due to the simultaneous occurrence of several processes. On the demand side, tourists are increasingly demanding components of culture and culture learning in their travel. On the supply side, in a fierce destination competition, place marketers have recognized the value of culture in obtaining a unique competitive advantage. Equally important is the cultural sector which, faced by a decrease in public funding, is turning to tourism for a substitute source of revenue (Hughes 1989). Finally, tourism industry supports such developments for their promotional value and improved destination image as well as for its ability to attract high yield tourist segments (eg. Zeppel and Hall 1991; Silberberg 1995).

Places that have government with a vision and willingness to invest and/or attract investment in large infrastructure projects, the professional cultural sector, the critical mass of local residents consuming cultural products regularly and a well-organized tourism industry usually benefit from the cultural tourism development, of which Sydney and, more recently Melbourne, are prime Australian examples. The success of these widely publicized examples has led many communities to believe that they, too, can capitalize on the cultural tourism development. In particular, this belief is widespread in some rural Australian communities, which are now turning to tourism as a replacement for declining agricultural and mining sectors. Likewise, some communities along the tourist belt on the Australian east coast, with already well-developed 4S tourism, are investigating the potential of cultural tourism development in order to stimulate vibrant, rich and meaningful community life.

The research reported here, conducted on the Australian Gold Coast, illustrates some of the problems that the latter communities are encountering in their attempts to develop cultural tourism. The paper starts with a description of the Gold Coast, specifies objectives of cultural tourism development in the region and then reports the results of the qualitative research conducted with the major stakeholders in this process. It concludes with a set of recommendations relevant for the development of cultural tourism in many mass tourism holiday destinations.

Settings - the Australian Gold Coast

The Gold Coast, located 80 km south of Brisbane, is the premier tourist destination in Australia, attracting 2.3 million domestic and almost one million international visitors per annum (Broome, Donkin and O'Reilly 2000). From the initially domestic destination for Australian families seeking the beach holiday on a 30 km stretch of beautiful sandy shores, in 1980s it emerged as a significant international destination with the construction of hotels and resorts of international standards, golf courses and an augmentation of its natural attraction by man-made attractions such as Sea World, Movie World, Dreamworld and Wet 'n' Wild. More recently, the appeal of the area as a tourist destination has been further enhanced by major events, such as the Indy Grand Prix and an increased emphasis on nature-based tourism in the hinterland. Tourism activity is well organized, with large tour operators tending to control itineraries of the south-east Asian market and local tourism operators often perceiving it difficult to break into this market segment.

Its scenery and lifestyle attracts not only visitors, but also residents. With a population approaching 400,000 it is now the 6th largest Australian city and with an average annual population growth of 3.9 percent it is one of the fastest growing residential areas in Australia (ABS 2000). Although the highest proportion of migrants to the coast are between 20 and 29 years of age attracted by the employment and business opportunities created by tourism, its mild climate and pleasant lifestyle draw an older population seeking to retire in paradise¹. Finally, its hinterland area is a home to a large number of visual artists while performing artists are attracted by the emerging film industry stimulated by the Movieworld - a large theme park.

While some have gained from the tourism industry, social impact research has demonstrated that there are many casualties due to this reliance on the tourism industry as the chief economic activity (Faulkner and Tideswell 1995; Tomljenovic and Faulkner 2000). Pressure from tourism and residential growth requires large investments in infrastructure developments at the expense of education, health care and cultural development. At the same time, the presence of the luxurious hotels and resorts, up-market residential developments and a plethora of regional shopping centres, have created an image of glitz and glamour and a lifestyle of lightheaded, superficial fun and entertainment. This image makes many of the social problems invisible. Yet, it is an area where the median average income is third lowest in Australia with a third of all households living just above the poverty line. The Gold Coast region also experiences higher levels of socio-economic disadvantage compared to Australia (Broome, Donkin and O'Reilly 2000). Rising unemployment, reliance on casual, part-time work, narrow choice of employment opportunities and low wages, lack of residential cohesion created by fast urban growth, are considered to be some of the factors underlying the increasing rate of urban poverty and crime as well as the residential transience.

The group of council officials responsible for social development believe that some of these problems can be reversed through strategic cultural development programmes. However, in Australia as in many other countries, cultural pursuits are less than generously funded and, moreover, continuous financial support depends on the ability of the cultural sector to demonstrate its profitability. Given the particular circumstances of the Gold Coast, the tourism industry was seen as an ideal partner to the cultural sector through which the region as a whole can achieve its objectives of cultural development - create a sense of identity among its

residents, a sense of pride in their city and community cohesion, as well as repair its somewhat tarnished image.

What resources do we have?

In spite of the luxurious hotels, casinos and theme parks, the Gold Coast has few cultural assets of which only the Gold Coast Art Centre with its adjunct Regional Art Gallery can be included in the tourist itinerary. The Centre's facilities, proximity to the tourist strip, ability to stage internationally renowned performances and regular patronage by local residents, consistency in terms of programmes and exhibitions, place it in a good position to become involved in cultural tourism.

Apart from the Art Centre complex which mostly houses performances from outside the region, there are only a few endemic cultural resources which are scattered and poorly coordinated, away from major tourist routes and with an inconstant programme of activities with a varying degree of quality. There are nine theatre groups, ranging from amateur to professional. Funding uncertainties, accessibility problems and the dubious adequacy of their facilities with fluctuations in production quality limit their appeal to visitors. There are a few dance companies, a ballet troupe, a symphonic orchestra and various other groups but these are all amateur-based. There are a large number of visual artists and crafts persons living in the Gold Coast and its hinterland. They explore various venues to exhibit their work, and some operate their own art galleries but these are substandard and mostly outside tourist corridors. Although affiliated through some associations, these do not cooperate among themselves while, with their members ranging from professionals to amateurs, it is difficult to maintain standard and quality at their group exhibitions. A few artists have set up their galleries in tourist strips (eg. Billich Gallery, Ken Done, Asleigh Manley) but these are commercial enterprises with products developed to suit tourist demand and, as such, have little meaning to local residents and no role in the cultural life of the Gold Coast. Event-based activities include a number of festivals, markets and fairs of which some are well patronized by tourists while in the many outlets at the Gallery Walk in the hinterland, with a highly concentrated mix of galleries, tea houses and restaurants, work of local artists is offered for sale.

Thus, both in terms of the infrastructure as well as in terms of endemic cultural resources, supply of the cultural product able to capitalize on the tourist trade is extremely limited. Some of the more professional artists have tried, in the past, to overcome the lack of the adequate exhibition and performance space by utilizing hotels, while the council has hoped that these could be alternative venues in the short term. However, they did not find hotel management particularly supportive and cooperative leaving ill-feeling and mistrust on both sides.

Are resort visitors interested in the destination culture?

The cultural tourists are considered to be financially well off, to have an above average educational level and to be middle to older age. They are experienced travellers who tend to visit an above average number of cultural attractions while travelling (Silberberg 1995; Zeppel and Hall 1991; Richards and Bonink 1994). Their number is expected to increase given the wider social trends towards higher education, empowerment of women, the aging of the baby-boom generation with a high emphasis on quality (Silberberg 1995; Hall and Zeppel 1991).

Research evidence suggests that only a small proportion, estimated at about 5 – 15 per cent of all tourists are core cultural tourists attracted to elite high-culture events usually packaged with five-star hotels. A further 30 per cent is only inspired by culture and usually attracted to blockbuster events. Lastly, and probably for the cultural sector at a resort destination the most important segment estimated at about 20 per cent of tourists, are culture-attracted tourists, who are drawn to a cultural product once at a destination. For this group the endemic cultural resources may be appealing providing that timely information is given about the performances, shows or exhibitions (Silberberg 1995; Bywater 1993).

Given that the aim of cultural tourism development on the Gold Coast was to develop the vibrant local cultural sector deriving economic benefits from tourism, the last segment - culture-attracted tourists - is the most interesting. However, the analysis of tourist demand revealed that the Gold Coast might not have a significant number of tourists likely to consume cultural products. Most of the domestic visitors originate from big cities with a variety of cultural offerings and are, thus, unlikely to actively seek out cultural experience on the Gold Coast, especially in the light of the Theme Park and entertainment-oriented image currently on offer. At the same time, in the structure of international demand, organized visits from south-east Asia prevail, and these, perhaps due largely to the cultural distance and language barrier as well as the structure of their itinerary, are not particularly interested in attending cultural activities or consuming cultural products. The North American and European tourist market, expressing higher interest in Australian culture, is not only a small proportion of the market but also one in decline. Even when such tourists express interest in local culture it is mostly satisfied through exploring public galleries, historical sites and museums, which the Gold Coast does not have.

A number of visual artists have hoped that the possibility exists to sell their products to the international tourists through duty-free and souvenir shops. However, research on the cultural consumption of overseas visitors has shown that the Gold Coast is not regarded as the best place for shopping (BTR 1997). Given that the tourists visit the Gold Coast as part of an itinerary which usually includes some of the large Australian cities (eg. Melbourne or Sydney) they do not spend a large proportion of their shopping budget in the area.

What about local residents?

As already mentioned, the Gold Coast attracts mostly either younger people looking for employment or an older, retired population. For the cultural sector the latter group is especially important, especially those with above average education and income levels who tend to attend cultural events regularly both in the Gold Coast Art Centre as well as in the large Brisbane venues (Gold Coast City Council 2000). The most popular events are drama and comedy, musicals, dance, opera and classical music concerts. It is also encouraging that the Gold Coast population in general tends to have a higher attendance rate than the State average, with attendance at some of the art forms, such as plays and art exhibitions, reaching almost one third of the regional population. Nevertheless, amateur theatre groups and visual artists report continuous decline in attendance by the local population so it appears that only well-organized, good quality events are attended. Visual artists also find it difficult to find buyers for their products and the few attempts to place their output in mainstream outlets have mostly failed.

Stakeholders' opinions and views

It is believed, somewhat optimistically, that the nature of tourist demand would change once the image of the Gold Coast is adjusted or complemented by the range of cultural products. However, for this to be achieved, it is necessary to create a goodwill and enthusiasm between both the cultural practitioners sector and tourism industry operators. In order to ascertain their respective positions in regards to cultural tourism development, a qualitative research based on in-depth interviews and focus group discussions was conducted with the tourism industry operators, local tourism bureaux, opinion leaders, visual and performing artists and amateur groups involved in cultural production.

Cultural sector

Focus groups and individual, in-depth interviews were conducted with visual artists, sculptors, potters and wood-carvers, individual performing artists and theatre groups, festival organizers as well as owners/managers of the commercial galleries on the Gold Coast. In principle, opinions were solicited regarding their perceptions of the tourism industry together with the perceived opportunities, constraints and barriers to the arts community's participation in the tourism industry. Furthermore, the aim was to ascertain their willingness to participate in the cultural tourism endeavour and to identify areas of assistance that they need in order to successfully capitalize on the tourism industry.

The most important finding is that attitudes are the biggest obstacle to cultural tourism development. The visual artists and potters enthusiastically received the idea of their involvement in tourism, primarily in order to increase the, currently mostly negligible revenue generated through their artistic pursuits. The participants argued that, due to Australian tourist promotion focused on the natural wonders, tourists are not made aware of the cultural practices available in Australia and the common perception of Australia as a young country with no significant culture, whatever that could mean, is reinforced through their tourist experiences and lack of the genuine Australian products offered to tourists. Through this argument it is possible to detect a degree of suspicion and tension inherent in their view of tourism.

However, further discussion revealed that this tension stems not so much from the artists' creative principles (eg. see Brokensha and Guldberg 1992), but rather from their frustration with their inability to break into the lucrative tourist trade. While, on the one hand, they would like to obtain a share of tourist expenditure, they would also like the tourism industry to take all the initiative in marketing, promoting and packaging their products for tourist consumption. As the tourism industry is not taking any initiatives in this direction, the artists accuse the industry of being interested only in profit and blame it for the 'development' mentality prevalent on the Gold Coast. The tourism industry, according to their perceptions, is neither recognizing nor appreciating the value of Australian art which is further exacerbated by the fact that the tourism industry has shown very little initiative to incorporate the arts into their overall tourist products.

The artists, though, have admitted that they probably have themselves to blame for their position not only in relation to the tourism industry but also to the community in general. They are aware that they lack business, marketing and promotional skill as well as financial resources to make any impact on community life in general. The lack of skill can be ameliorated through educational courses and seminars. Nevertheless, the fact remains that they do not have adequate infrastructure and exhibiting in sub-standard facilities tends to depreciate their

creative pursuits further, that these facilities are outside tourist districts and main transfer corridors and that, due to the lack of competent promotion and marketing, there is a low level of awareness, among both residents and tourists, about their products.

Conversations with the performing art groups revealed a slightly different pattern of response. Performing art on the Gold Coast is dominated by the amateur groups. However, as many professional actors arrive at the Gold Coast in the hope of getting involved in the local movie industry, they join these groups and introduce a level of professionalism into their output. Facing continuous decline in their local audience numbers they are eager to turn to tourists. As with the visual artists, there is a deep-seated distrust of the tourism industry - it is seen as volatile, unpredictable, highly seasonal and, most importantly, too difficult to get into. Unlike the former group, most of these theatre companies have their own venues but, again, these are not accessible and perceived to be not of a sufficient standard for tourists. Unlike the visual artists who recognized that they have to be proactive if they want to capitalize on the tourism industry in the region, this group wants tourists as long as it is someone else who is attracting them to their performances. They lack the initiative, skills, time and financial resources to adequately link with the tourism industry.

Finally, both groups demonstrated a distrust in this particular project as they expected the tourism industry, rather than local government, to take the lead. In other words, instead of taking a proactive role in the identification of opportunities that tourism offers, they are passively waiting for the tourism industry to take the initiative.

Is the tourism industry interested?

As already pointed out, the tourism industry on the Gold Coast is extremely well organized and served, directly or indirectly, by a plethora of local businesses - restaurants, water-sports companies, boat rides and shows, golf tours and tournaments, sightseeing tours, night clubs and entertainment venues, casinos and gambling parlours. While this ensures a pleasant visit with a lot of things to see and do, local tourism operators find it difficult to survive this stiff competition. Breaking into the tourism markets requires creativity, motivation, dedication and persistence. The question here is whether the tourism industry has any awareness of cultural practices, any appreciation of these and, finally, any interest to include them in their offerings. A series of in-depth interviews was conducted with the Chief Executive of the Gold Coast Tourism Bureau, hotel sector executives and in-bound tour-operators.

Although the skepticism of the tourism industry was expected, the adverse attitudes and strength of conviction that the tourism industry had regarding the cultural tourism potential in the region generally and the endemic cultural resources in particular was still surprising. Results revealed significant perceptual and attitudinal barriers which relate, firstly, to the tendency to deprecate Australian culture in general and regional culture in particular¹ and, secondly, to negative perceptions that the tourism industry harbours about the regional cultural sector. They argue that Australia, in general, does not have much to offer to the cultural tourist and completely disregard local cultural production on the ground of quality and consistency. Local artists are perceived as amateurs who think that 'society owes them a living' and expect

¹ Many hotels and tour companies are owned by overseas chains. Consequently, they tend to appoint managers from their native countries (UK, USA, Japan) who, although understanding well the needs of their clientele, are not particularly familiar with the Australian and/or regional culture and way of life.

the tourism industry to be a charity institution. One executive, in particular, put in bluntly: ‘artists do not understand that we are not the Red Cross... we are in the business of making money with the minimal amount of disruptions, problems and uncertainties’.

They are interested in cultural tourism development only if it would complement the overall destination image and providing that the whole exercise is initiated, managed and financed by local government. The second interest that they have in cultural tourism is if it could increase the number of visitors to the Gold Coast but, for this, they advocate large, imported events able to generate nationwide attention. The local cultural resources hold little potential as they are considered to be of a poor quality and unsophisticated, scattered, infrequent and inconsistent. They have neither interest in supporting their development nor in helping to promote or sponsor them.

These attitudes are partly based on their past experiences with cultural events. A few hotel managers have staged an occasional concert or an exhibition in their lobby area, but have found these to give them mixed outcomes. Firstly, local residents, in spite of the well coordinated marketing campaign, were attending these in small numbers and mostly when the hotel manager made a personal invitation. The second problem was artists with whom the managers found it difficult to cooperate, especially in terms of honouring their commitments and agreed-upon arrangements. Overall, these projects were considered as too big an effort for a minimal amount of mostly intangible return.

In summary, the tourism industry on the Gold Coast has, in an era of thriving tourism, little initiative to turn to cultural tourism. They see that there is little demand for the cultural products among visitors as well as residents while the supply of the cultural sector is extremely limited. If the strategy of cultural tourism was developed with a view to enhancing destination image and increasing visitation they might be supportive, but they see this to be primarily a responsibility of the local government.

The Gold Coast Art Centre

Finally, the Gold Coast Art Centre is seen as the key institution by both the tourism industry and cultural sector. While the latter see the institution as being a vehicle in promoting local cultural output, the Art Centre’s management, as well as the tourism industry, perceive it as a venue for staging major popular musicals, plays and touring exhibitions. The management of the Centre has, in the past, participated in putting together a few packages including accommodation, dinner and performance, but point out that it has only been due to the periodically difficult times in the accommodation sector that the tourism industry was ready to cooperate. In general, they see the tourism market as difficult to break into and rewards, in comparison to the marketing effort required, are questionable. With the commissions sought by the tourism industry, the involvement is also seen as not being financially viable. At the same time, the management tends to deprecate the local cultural assets and sees the poor quality and the lack of critical mass of cultural activities as a major obstacle in building good quality cultural tourism.

Implications, recommendations and conclusions

For successful cultural tourism both the cultural sector and the tourism industry, supported by the local government, need to work in partnership. Yet the two often harbour negative sentiments, with the tourism industry acknowledging only the promotional value of culture, while the arts sector has often been only marginally interested in tourism and it is only recently that it is being forced to consider tourism as an additional source of income. As was revealed by this inquiry conducted on the Australian Gold Coast, aimed at ascertaining the attitudes of both sectors towards regional cultural tourism development as well as evaluating the potential of regional cultural resources, forging this partnership might be an extremely difficult and complex process.

The analysis of the secondary data indicated that, in spite of the noted increase in the number of cultural tourists in general, this might not be occurring at every destination. Moreover, some destinations, as the case of the Gold Coast illustrates, record a steady decline of participation in cultural attractions. Destination promotion often tends to predispose travellers to a certain type of experience as well as attracting certain segments of tourists with a low level of interest in the cultural practices of a destination culture. In the case of the Gold Coast, predominantly south-east Asian visitors have only marginal interest in arts activities. This means that cultural tourism cannot be built from the already present market segments but a completely new market needs to be attracted. Domestic tourists, on the other hand, are the largest market for a resort destination. However, originating mostly from the large metropolitan centres with a wide range of cultural offerings they are not particularly interested in cultural consumption while in a resort area. At the same time, the image of fun and light entertainment projected by resort destinations is often a deterrent to those seeking the cultural component in their tourist experiences.

Finally, even if the resort destinations attract those interested in the regional cultural products, where the cultural output is fragmented, inaccessible and inconsistent, as it is on the Gold Coast, it is difficult to promote it to the visitors. The lack of appropriate infrastructure limits further potential of cultural tourism development in such circumstances.

At the same time, the tourism industry at resort destinations might not be particularly interested in this market segment. The lack of interest is partly a reflection of their awareness of market trends and demands. More importantly, the findings of this research have confirmed the existence of negative sentiments that the tourism industry harbours about the cultural sector. They are either not aware or are non-appreciative of the local cultural resources, questioning the cultural sector's ability to deliver a good product consistently and professionally. But for the cultural sector it is important to bear in mind that some of these attitudes are formed on their actual experience with the organization of art-related activities and should not be dismissed on the grounds of non-appreciation of arts. It is likely that many resort destinations share similar barriers in this respect. In addition, resort residents may not be particularly interested in the local cultural resources. While the support of local residents is considered crucial for the sustainability of cultural events, among the Gold Coast residents it is assessed as being not strong enough to make many of the cultural activities viable. However, contrary to the commonly held assumption, the cultural sector is ready to embrace the tourist market primarily as a means of widening their market appeal and raising revenue. In this, however, they face some major obstacles: shortage of business skills, lack of financial resources, paucity of products lending itself to packaging and shortage of the infrastructure. In combination, these factors have led to depreciation of the cultural sector by both the tourism industry and the resident community.

In this situation two basic approaches could be taken. The easier approach is to address each of the identified problems individually and develop tailor-made solutions. Thus, for example, the shortage of business skills among the cultural practitioners could be alleviated through educational courses sponsored by the council. The targeted campaign aimed at increasing awareness of regional cultural resources could also be put in place. The tourism industry may be prompted to take an initiative and support individual cultural activities. The local cultural or art centres could be motivated to give more space to local cultural production. It is argued that these initiatives, while likely to have a direct positive impact on a limited number of individuals and organizations, would fail to achieve the overall objective - development of the rich and vibrant community life which would create a sense of community cohesiveness and the pride of its residents and, through it, alleviate some of the social problems caused by rapid population growth and residential transience while, at the same time, being partly financed through its involvement in cultural tourism. Instead, it is recommended that for this to be achieved it is necessary to:

- define the strategic direction of the cultural development where major themes can be initiated that are compatible with the image and lifestyle of a destination and needs of its residents. In the case of the Gold Coast, where there is a poor supply of the traditional cultural resources, the resort may position itself as a fast-growing, internationally-oriented city expressed through, for example, modern or applied art. Such theming would avoid random events failing to achieve the overall objective of cultural development and will provide a promotional mechanism for the region's tourism industry.
- create an environment supportive of cultural development through a broad ranging consultation with residents and all stakeholders involved - community representatives and groups, cultural industries, the business sector, local government and the tourism industry. This is necessary to ensure that all interested parties identify with the cultural programmes and support the individual activities and events. The tourism industry could then be involved in the packaging and promotion, the business sector could assist through participation on committees and advisory boards, local government could offer funding and coordination, while the cultural sector itself would be able to develop products meaningful to local residents as well as attractive to visitors.
- develop adequate infrastructure, which should enable cultural activities to be highly concentrated, visible and accessible to both residents and visitors alike, while giving artists opportunities for networking and the coordination of their activities. The infrastructure has to be adequate although it does not necessarily mean expensive or large scale.
- identify, develop and nurture endemic cultural resources what would ensure not only the critical mass of cultural activities meaningful to local residents, but also would retain local talent in the region and attract fresh ones. This process requires a long-term commitment but relatively low levels of financial support.
- attract events, organizations and individuals with national and/or international reputation while the endemic resources are nurtured. These would improve the image of the region, provide promotional tools and inspire and challenge local cultural practices. Whether these are art schools or colonies, competitions, festivals or concert series, they have to fit within the themes defined at the

outset. These events do not have to be capital intensive, but innovative and compatible with the resort image. Artists should be encouraged to interpret the regional character, thus contributing to the development of the Gold Coast identity and promoting it through their art production.

This research has clearly demonstrated that, contrary to popular belief, not anything anywhere can become a cultural tourism attraction. Therefore, communities wishing to develop cultural tourism have to be realistic and identify, firstly, what would be the purpose of this development and who would or, would they wish to be, the major beneficiaries of its development. If they wish to obtain significant benefits they have to craft a vision based on a broad-ranging consultation which would take the interest of all stakeholders into account as well as be based on the careful and realistic assessment of the cultural resources available and/or their potential. Without a coordinated approach, each stakeholder might embark on the involvement in cultural tourism but the benefits of this process would be limited and the impact on community life questionable.

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Summary Report

The two day seminar **Culture: A Driving Force for Urban Tourism - Application of Experiences to the Countries in Transition** was divided into three main sessions, two of which were held in one day: *Cultural Tourism as a Niche Market: Culture - Basic Resource for Urban Tourism* and *Best Practice Examples in Urban Tourism Management*. The second day of the seminar was foreseen as a round table discussion on the subject of *Round Table: Croatian Challenges and Prospects for Cultural Tourism Development in Croatia*. The report on the session follows.

The seminar was opened by its organizer, **Daniela Angelina Jelinčić** who stressed the circumstances in which this seminar was organized: Croatia recognized the subject of cultural tourism as a very important one to be developed both as a research theme as well as in practice, in its managerial aspect.

The Minister of Culture, Dr **Antun Vujić** mentioned that the Ministry of Culture and the Ministry of Tourism have agreed upon stronger cooperation and this was the first initiative of this kind at state level. This shows the recognition of the importance of coordination in this field in order to avoid mistakes in planning cultural tourism programmes and to stimulate initiatives starting from the highest level.

Mrs **Pave Župan Rusković**, the Minister of Tourism stressed the importance of cultural tourism development for its well-educated actors - cultural tourism earns significant profit since visitors interested in culture spend more money in hotels, restaurants and generally are greater spenders than the average tourist. A promotional film was shown presenting the Croatian potential.

Mrs **Aida Cvjetković**, on behalf of the County of Dubrovnik and Neretva Prefect also addressed the audience as well as Mr **Vido Bogdanović**, the mayor of Dubrovnik city.

Mr **Vjekoslav Vierda**, the Director of the Institute for the Restoration of Dubrovnik and co-organizer of the seminar wished for a happy marriage between the culture and tourism.

The first session *Cultural Tourism as a Niche Market: Culture - Basic Resource for Urban Tourism* was opened by **Daniela Angelina Jelinčić** of Culturelink/Institute for International Relations in Zagreb. In her presentation *Croatian Cultural Tourism Development Strategy*, Mrs Jelinčić outlined the principles underlying the development policy: to use local resources wherever possible and to be distinctively Croatian. The objectives, besides increasing the number of visitors, are: extending the season, extending the geographical base beyond the seacoast into the hinterlands, guaranteeing sustainability and encouraging micro-business

development and economic prosperity. The issue of sector coordination seems obvious and a *sine qua non* but so far it has hardly been present in Croatia. The successful strategy cannot be created within the framework of one sector, for example tourism or culture, separately. The key word here is multidisciplinary. Also an intersectoral approach within the framework of culture itself should be considered. If tourist programmes are coordinated among various cultural institutions and events in the destination, such as between museums, galleries, libraries, theatres, cinemas, etc. it will not be difficult to create a common package to be supplied for tourists to get to know the cultural life of a community. Strategy creation, therefore, should focus on the use of distinctively Croatian local resources, and encourage decentralization of culture and tourism, coordination of cultural and tourist sectors, and an intrasectoral approach within the sector of culture.

In her paper, *Croatian Tourism: Consuming Culture, Affirming Identity* **Renata Fox** demonstrates two complementary processes: shaping of Croatian culture for tourism and shaping of Croatian tourism for culture. While cultural tourism is often seen as otherness exchanged for money, the process is rather more complex, often lacking harmony and mutual cultural understanding. It is important, emphasized Fox, that Croatia be not discouraged by the Janus face of culture commodification. On the one hand, cultures - essentially living and learning forms - do tend to become subject to consumerism, lose their social role, their political function and their authenticity. The presentation of cultural artefacts for consumption, however, is identity affirming and liberating, which is especially important for cultures, such as the Croatian one, seeking to explain its traditions and values. Ultimately, the success of Croatian (cultural) tourism is subject to broader political and economic developments. If Croatia wants to keep up the pace in tourism and hospitality, it will have to entice collaborative processes, develop a more competitive higher education system, aiming to generate change, raise standards, build a new learning culture, and cooperate more intensively with the hospitality industry.

The topic of **Frans Schouten's** presentation *Effective communication with visitors at heritage sites* was the importance of challenging communication skills of heritage professionals. Optimal communication will create UNIQUE-experience (Uncommon, Novelty, Informative, Quality, Understanding, Emotion). Special interest tourism - as cultural tourism is - needs excellent product development that distinguishes one destination from other competing destinations. For product development heritage interpretation and quality services are too important to be left to the heritage professionals. Rather, the involvement of the tourism industry and tourism experts is required.

Antonio Paolo Russo suggested that tourism management could follow different philosophies, however, in a contemporary city it needs to be competitive, creative and flexible. Tourism governance is about bringing people together and bridging those gaps that risk to undermine the long-term socio-economic viability of cultural tourism: between producers and suppliers, between producers of different goods, between governments and governed, between host and guest communities. In a 'cluster environment', the organization of the industry is germane to such encounters. The telecom infrastructure is an ideal media to achieve some of the 'traditional' goals of tourism management (e.g. flow regulation, destination marketing, advance booking, etc.), enhancing at the same time the cohesion between different players in the system.

In her presentation, *Cultural Tourism in the Transitional City*, **Priscilla Boniface** evaluated the predominant aspects and determining issues which affect the establishment of cultural tourism as an activity on the transitional scene. Her presentation involved portrayal of the key elements likely to demand particular attention during a time of transition. She emphasized the need to consider the total situation, know the aims that cultural tourism is hoped to achieve within it, be aware of context in tourism terms and decide what is suitable to give space and recognition to all participants, cultures and players.

There is little doubt, as argued by **Howard Hughes**, that tourists can be attracted by theatre and music. People will travel to see the arts if the product has sufficient drawing-power. To attract arts-core tourists, the arts need to be 'distinctive', which means: not being available elsewhere in the form of the production, the performers or the quality, convenient for potential audiences to purchase the product, having supporting infrastructure. There is, however, a danger of market saturation, the regeneration aspect of using the arts to generate tourism is difficult to demonstrate, the incorporation of the arts into tourism strategies raises many additional issues including the meaning and significance of the arts.

There may be no easy solution to satisfactorily reconciling tourism with history and the arts but, at the least, it is necessary to expose, recognize and explore the issues. The arts are too important to treat as just another industry or tourist resource and they require sympathetic consideration from all who deal with them or seek to gain financial benefit from them.

In his paper *The Place of Textile in Cultural Tourism* **Roland Delbaere** focused on a methodological approach to textile tourism with the possibility of application to other cultural sectors, such as technology, science or historical memory. He briefly presented the review of the international research in the area of textile tourism in the past fifteen years following the intercontinental Silk Route project of UNESCO. The topic proper of his presentation is focused on a methodological approach to textile tourism which can be applied to other cultural sectors, including technology, science or historical memory, and which can serve as the basis for the elaboration of a valid and user-friendly cultural tourism policy. Textile can combine with other crafts and art itineraries, textile trails can be partly based on heritage and partly on recreation. Textile is as indispensable as music in folklore and regional identity festivities. As the first extension of our skin, textile occupies an important place in our daily life. It can also become a new key to read the town and landscape heritage, and a new viewpoint is always stimulating.

Franco Bianchini of the De Montfort University, Great Britain, presented the paper¹ on *The Contribution of Cultural Planning to Urban Tourism Strategies*. Careful strategic planning and management is needed, according to Mr Bianchini. He questioned the use of Kotler's destination marketing as the best approach to the development of European cities, since Kotler's model is originally developed for American destinations.

Christina Quijano Caballero explored ways and policies to ensure that food is an integral part of the tourist's cultural experience. Cuisine identifies a region and its characteristics, it gives a nation its identity and must be considered an integral part of a specific culture. It is part of both our tangible and intangible heritage. The history of civilization is interwoven with the history of food. Not only is cuisine an art, whether it be the preparation of

¹ This paper, unfortunately is not presented in these Proceedings.

a simple dish or fabulous feast, but it has also proved to be an inspiration and indeed a necessity in developing other aspects of culture.

The original reason for travel or movement of peoples was a search for greener pastures and basic food items. Eventually with the development of agriculture peoples settled and there were other reasons for travel, mainly for trade, firstly in essential goods such as salt and other natural resources. As new products and goods, as well as new ideas, were exchanged, a new traveller was born, and a new industry.

The first session of the seminar has shown that there is a great awareness both in the international academic community and in the tourist industry of the increasing importance of various aspects of culture in the global tourism industry. The new tourists are seeking diversity and cultural difference. Functioning within an increasingly competitive environment, host countries, Croatia among them, will have to work on their development, imaging and uniqueness.

A city tour guided by **Vjekoslav Vierda**, the director of the Institute for the Restoration of Dubrovnik followed, where participants were able to find out about cultural management of the historic city centre and its presentation for tourism. It was a very professional, interesting and vivacious city tour.

The second session *Best practice examples in urban tourism management* was opened by **Fien Meiersonne** of the European Leisure and Recreation Association, the Netherlands. The paper entitled *The secrets of Holland* presented a project of six old Dutch cities (Delft, Dordrecht, Gouda, Haarlem, Leiden and Schiedam), which decided in 1995 to start cooperation as cultural-historic destinations. Fien Meiersonne presented the project from its start to its realization concluding with bottlenecks and learning points. Some other examples were also presented, emphasizing cooperation as the main factor in tourist planning. In the author's opinion, Croatian cities like Dubrovnik, Split, Zadar and maybe Pula could consider thinking and acting along the same lines as has been done in the Netherlands.

Following the case of the Netherlands, **Vesna Borković-Vrtiprah** and **Ivo Ban** of the Faculty of Tourism and Foreign Trade, Dubrovnik, presented the case of the city of Dubrovnik in their paper *The Role of Cultural Heritage in Tourism*. They claim that the kind of potential that Dubrovnik's tourist supply offers should be made better use of, as Dubrovnik, with its attractive natural and cultural rarities, has the possibility of achieving appropriate originality and variety in comparison to competitive destinations. In terms of heritage, and despite the fact that Dubrovnik only receives a small portion of the total European cultural tourism market, Dubrovnik can offer a significant potential founded on the diversity and richness of its historic, monumental and artistic resources. The paper presented some statistical data on tourist traffic in the Dubrovnik area and tourist motives for coming as well as tourist visits to cultural institutions. It was concluded that in future, culture should take on a more significant position in the tourist supply of Dubrovnik while marketing activities should be directed towards this objective. It is important for cultural attractions to be managed with expertise and long-term know-how because only culture that is treated as a function of tourism in the highest measure possible can give the maximum economic effects.

Tonka Pančić-Kombol of the Collegium Fluminensis Polytechnic of Rijeka, Croatia presented the paper¹ *Culture as a Basic Resource for City Tourism in Croatia*. She gave a brief history of the neglected policy for city tourism in Croatia as a tourism potential, except for certain coastal cities which were transformed into tourism resorts. Cultural heritage could be used as a very strong tourist product element in the development of city tourism through which Croatia could gain and confirm its identity on the international level and in the tourist market. In this sense cities are in need of fundamental research and development projects. Actual attempts to start up working groups in Rijeka, Karlovac and Osijek confirm the willingness of many professionals to contribute to projects, which encourage tourism development in their cities. Also, it has been confirmed that these cities have significant cultural heritage, which has never been regarded with concern as a tourism resource in city development plans.

Lorena Boljunčić and **Doris Cerin Otočan** both provided case studies of Istria since they work for the Istria County Tourist Association as part-time collaborators for cultural tourism. The topic of **Lorena Boljunčić's** presentation was *Cultural Tourism in Destination* presenting the history of the slow development of selective tourism beginning from the mid1990s when new tourist products were being developed, such as wine roads, agricultural tourism, bicycle tracks. Also the rich Istrian cultural heritage is being regarded as an excellent tourist resource. Creating better conditions in the destination itself and a more systematic use of cultural resources in promotion outside the destination are the basic activities needed for the good packaging of a tourist product. Careful dealing with cultural inheritance must be present even outside tourist frameworks - by reconstructing cultural monuments we are not only creating better conditions for cultural tourism, but are also improving our surroundings.

Doris Cerin Otočan, as a marketing manager of The Istrian National Theatre in Pula, had the opportunity to present us with the practical issues of *Cultural Tourism in the Region of Istria: Interregional and International Cooperation*. Earlier, the cultural policy of the Region of Istria (County of Istria) was based on implementing cultural management exclusively within the boundaries of cultural institutions. However, in the present economic and cultural surrounding the cultural dimension does not succeed in manifesting itself through its own resources. For that reason many other strategies of development have been devised, for example stronger connection between culture on one side and tourism and economy on the other (rural tourism and entrepreneurship), and between culture and traffic. With its multiculturalism and multi-ethnicity and with a qualified personnel, Istria could compete vigorously with other west European countries or regions, in the first place as a touristic destination based on cultural tourism.

A quite distant case study from the Gold Coast, Australia, was provided by **Renata Tomljenović** of the Institute for Tourism, Zagreb. The title *Sun, Sea, Sand and Culture: Compatible?* reveals the possibility of cultural tourism development at mass tourism destinations.

Ian Jenkins and **Andrew Jones** of the School for Leisure and Tourism, Swansea Institute, Great Britain, presented an interesting paper entitled *The Importance of Cultural Niche Markets to Wales Urban Tourism Products*. In a detailed theoretical approach to cultural tourism, they claim that the concept of a niche has changed. The implications of this in their paper are that the niche sells the location, and not the other way around. They evaluate

¹ This paper, unfortunately is not presented in these Proceedings.

festivals, events and literature in urban tourism and review the tourism product within Wales and Swansea. The case studies of the Welsh poet, Dylan Thomas, and Welsh Festivals, namely the Swansea Bay Summer Festivals are examined. In conclusion, tourism niches clearly have the potential to capitalize upon the current splintering of market segments and may well play a far more significant role in tourism's future developments.

As the second session presented the best practice examples, it was an excellent introduction for the second day *Round Table: Croatian Challenges and Prospects for Cultural Tourism Development in Croatia*. The round table moderator, **Tomislav Šola** introduced participants to issues typical for countries in transition, and a few practical presentations from participants followed. The discussion concerned very practical issues of management of cultural institutions for Croatian tourism. The ever present lack of funds in transitional countries, issues of decentralization, lack of coordination between sectors or within sectors, lack of cultural management education, the socialist legacy in decision making and management issues were discussed. Tourist workers asked cultural workers to be more cooperative, with more flexible working hours and a detailed programme not subject to change. A lot of barriers are present - legal, financial or organizational, which prevent cultural institutions from being fully used in order to contribute to tourist needs to the maximum.

The seminar was closed with the unanimous outcome: the need and wish to meet again and to make such seminars become a tradition.

Annex 1

Seminar Programme

1. INTERNATIONAL SEMINAR

Culture: A Driving Force for Urban Tourism

Application of Experiences to Countries in Transition

18-19 May 2001

Dubrovnik, Croatia

Grand Hotel Park

AGENDA

Friday, 18 May 2001

8:00 – 9:00 Registration

9:00 Opening of the seminar

Pave Župan-Rusković, Minister of Tourism, Croatia

Antun Vujić, Minister of Culture, Croatia

Aida Cvjetković, Dubrovnik-Neretva County Prefect Deputy

Vido Bogdanović, Mayor of Dubrovnik

Daniela A. Jelinčić, Culturelink/Institute for International Relations

Vjekoslav Vierda, Institute for the Restoration of Dubrovnik

9:45 Cultural Tourism as a Niche Market: Culture - Basic Resource for Urban Tourism

Daniela Angelina Jelinčić, Culturelink/Institute for International Relations, Croatia, *“Croatian Cultural Tourism Development Strategy”*

Moderator: **Renata Fox**, Faculty of Tourism and Hospitality Management, Croatia, *“Croatian Tourism: Consuming Culture, Affirming Identity”*

Frans Schouten, Netherlands Institute for Tourism Studies, The Netherlands, *“Effective Communication with Visitors at Heritage Sites”*

Antonio Paolo Russo, European Institute for Comparative Urban Research, The Netherlands, *“Cultural Clusters and Tourism Development – The case of Venice”*

11:00 Coffee break

11:20

Priscilla Boniface, University of North London, Great Britain, “*Cultural Tourism in the Transitional City*”

Howard Hughes, Manchester Metropolitan University, Great Britain, “*The Role of Theatre and Music in Urban Tourism*”

Roland Delbaere, Hodie Vivere Foundation, Belgium, “*The Place of Textile in Cultural Tourism*”

Franco Bianchini, De Montfort University, Great Britain, “*The Contribution of Cultural Planning to Urban Tourism Strategies*”

Christina Quijano-Caballero, World Leisure and Recreation Association, Honorary member, Austria, “*Cultural Tourism and Culinary Heritage*”

discussion

13:30 Lunch

15:00 City tour – Case study of Dubrovnik, **Vjekoslav Vierda**, Institute for the Restoration of Dubrovnik

17:00 Best practice examples in urban tourism management

Moderator: **Ian Jenkins** School for Leisure and Tourism, Swansea Institute, Great Britain

Ian Jenkins & Andrew Jones, School for Leisure and Tourism, Swansea Institute, Great Britain “*The Importance of Cultural Niche Markets to Wales Urban Tourism Products*”

Vesna Borković-Vrtiprah & Ivo Ban, Faculty of Tourism and Foreign Trade, Croatia, “*The Role of Cultural Heritage in Tourism*”

Tonka Pančić-Kombol, Collegium Fluminensis Polytechnic of Rijeka, Croatia, “*Culture as a Basic Resource for City Tourism in Croatia*”

Fien Meiresonne, European Leisure and Recreation Association, The Netherlands, “*Secrets of Holland*”

Lorena Boljunčić, Tourist Association of the County of Istria, Croatia,
“Cultural Tourism in Destination ”

Doris Cerin, Istrian National Theatre, Croatia, *“Cultural Tourism through
Inter-regional and International Project Cooperation ”*

Renata Tomljenović, Institute for Tourism, Zagreb, Croatia, *“Sun, Sea, Sand
and Culture: Compatible?” – Cultural Tourism at Mass Tourism Destination ”*

discussion

20:00 Dinner

Saturday, 19 May 2001

9:30 Round table: Croatian challenges and prospects for cultural tourism
development in Croatia

Moderator: Tomislav Šola, Faculty of Philosophy, Zagreb, Department of
Museology, Croatia

This session will examine the ways in which the development of cultural
tourism in Croatia can contribute to the overall cultural/tourist sector as well as to the
economic sector. Round table will present the opportunity for all participants to
present their views and suggest solutions for the development of sustainable cultural
tourism in Croatia. The discussion will comprise issues related to the private and
public sector, legal support, education, extension of the tourist offer, extension of the
tourist season and geographic basis, etc.

12:30 Conclusions

13:00 Lunch

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