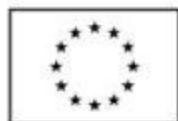




# INTRODUCTION TO CULTURAL TOURISM

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# INTRODUCTION

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- Cultural tourism has changed dramatically since it was first recognized as part of the array of available tourism experiences in the late 1970s and early 1980s.
- Only in the late 1970s, when tourism marketers and scholars realized that some individuals traveled specifically to learn more about a destination's culture or legacy, was it acknowledged as an unique product category (Tighe 1986).
- It has grown from those humble beginnings to become a mainstream, mass product.

# INTRODUCTION

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- Destination management organizations (DMOs) now appreciate that cultural tourism, in its broadest sense, provides an opportunity to position communities uniquely and, in doing so, gain a sustainable competitive advantage.
- The role of the cultural heritage management community has expanded as well, from managers and custodians of cultural assets, to providers of products.
- Academics, consultants, and government agencies have also embraced this topic as an exciting research field. As a consequence, our understanding of what cultural tourism is, who cultural tourists are, and what is required to provide quality experiences has become much more sophisticated.
- Yet, while the field has grown, much also remains unchanged, as many misconceptions about the nature of this activity, the level of interest by tourists and factors leading to successful product development still persist. Most importantly, the growth of the field has created new management challenges relating to how to achieve true, triple bottom line sustainability.

# WHAT IS CULTURAL TOURISM?

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- Cultural tourism is one of the oldest forms of special interest tourism, and yet, remains one of the more misunderstood types.
- People have been travelling for what we now call cultural tourism reasons since the days of the ancient Romans visiting Greece and Egypt (Perrottel 2002) or Chinese scholars making journeys to beautiful landscapes (Yan and McKercher 2013).
- At the same time, places and activities that we now label as representing cultural tourism products were not identified as such until recently.
- Instead, going to historical places, cultural landmarks, special events, festivals, seeing street performances, and going to museums were all considered to be part of a larger vocabulary of sightseeing activities that made up the whole travel experience.

# WHAT IS CULTURAL TOURISM?

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- There is still much debate about what cultural tourism is and who cultural tourists are, for all travel involves some cultural element caused by leaving one's own home and travelling to different places.
- Doing so forces one from a comfortable home culture into a somewhat alien culture, even if it is only to a nearby domestic destination.
- Many people have the mistaken belief that experiencing cultural difference is equivalent to cultural tourism, and therefore argue that anything and everything can fall under its umbrella. But such a conceptualization serves little purpose, other than to conflate ideas, confuse terms and mislabel both tourists and attractions.
- The seemingly fundamental questions of what cultural tourism is and who cultural tourists are have proven to be difficult to answer definitively, for there are almost as many variations of definitions as there are tourists.

# WHAT IS CULTURAL TOURISM?

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- The inability to establish a clear conceptual foundation of what it is we are looking at and who the participants are has resulted in misuse of the term and confusion over who its core stakeholders are, leading ultimately to people defining the term to suit their own narrow interests.
- The American Chapter of ICOMOS (the International Council on Monuments and Sites), which stated that "culture tourism as a label signifies many things to many people and herein lies its strength and its vulnerability," recognized this problem almost 20 years ago (US ICOMOS 1996: 17). More recently, Smith (2003) has added that there is further debate surrounding the definition of "culture," the fundamental component of the sector.

# WHAT IS CULTURAL TOURISM?

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- Over the years, a number of definitions have been proposed that embrace some element of this activity, but do not encapsulate it fully. Early tourism-related definitions place cultural tourism within a broader framework of tourism and tourism management theory (Zeppel and Hall 1991) or as a form of special interest tourism (Zeppel 1992; Ap 1999). For example, the
- United Nations World Tourism Organization (UNWTO) defines cultural tourism as:
- *the movement of persons to cultural attractions in cities in countries other than their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs and all movements of persons to specific cultural attractions, such as heritage sites, artistic and cultural manifestations, arts and drama to cities outside their normal country of residence.* (Whyte, Hood and White 2012: 10)

# WHAT IS CULTURAL TOURISM?

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- A second group of motivation-related definitions focuses on the belief that cultural tourists are motivated to travel for different reasons than other tourists. Organizations such as the UNWTO (2006a) and the Canadian Tourism Commission (Whyte, Hood and White 2012) describe cultural tourism on the basis of the desire to learn about a destination's cultural heritage as a significant travel motive.
- Building on this notion, a third set of criteria takes an experience stance and claims that motive alone does not adequately capture the scope of this industry. Instead, cultural tourism entails some form of meaningful interaction with the distinctive social structure, legacy, and peculiar character of places, as well as a quest or search for deeper understanding (Blackwell 1997; Schweitzer 1999). (Bachleitner and Zins 1999; Hannabuss 1999).
- The US National Endowment for the Arts, for example, defines it as “travel directed toward experiencing the arts, heritage, and special character of a place” (Whyte, Hood and White 2012: 8).

# WHAT IS CULTURAL TOURISM?

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- The UNWTO (2006a) suggests cultural tourism represents movements of people motivated by cultural intents such as study tours, performing arts, festivals, cultural events, visits to sites and monuments, as well as travel for pilgrimages.
- Whyte, Hood and White (2012), for example, indicate the Canadian Tourism Commission definition includes performing arts (theatre, dance, music), visual arts and crafts, festivals, museums and cultural centres, and historic sites and interpretive centres.
- US National Endowment for the Arts specifies museums, historic sites, dance, music, theatre, book and other festivals, historic buildings, arts and crafts fairs, neighbourhoods, and landscapes.

# WHAT IS CULTURAL TOURISM?

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- Each of the approaches has some merits, but each is also limited in scope.
- The main benefit of tourism-related definitions is that they identify cultural tourism as a form of tourism and not a form of cultural heritage management.
- But they are too generic to be used in a meaningful manner. Motivational and experiential definitions recognize that the reasons for travel, and thus experiences sought by cultural tourists differ from those of other tourists.
- Operational definitions resolve the product dilemma, and also indicate that many cultural tourism products are places of local cultural significance used by local stakeholders.
- But these definitions are the weakest of all, for they assume that anyone who visits a place or has an experience that may or may not reflect a destination's cultural heritage must be, by definition, a deep cultural tourist according to the motivational and experiential definitions

# WHAT IS CULTURAL TOURISM?

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- Cultural tourism is defined as:
  - *A form of tourism that relies on a destination's cultural heritage assets and transforms them into products that can be consumed by tourists. (McKercher and du Cros 2005: 211–212)*
- This definition recognizes that cultural tourism involves four elements:
  - tourism;
  - use of cultural assets;
  - consumption of experiences and products;
  - the tourist.

# THE USE OF CULTURAL ASSETS

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- Even while it is acknowledged that this is a type of tourism, its fundamental components—the cultural heritage assets of a town or a country—must always be remembered. Heritage, according to ICOMOS, is a broad concept that encompasses both tangible and intangible resources, including natural and cultural environments, built environments, historic sites, and landscapes. Tangible resources include collections, knowledge from the past and present, as well as past and present cultural practices and knowledge (ICOMOS 1999).
- In recent years, the concept has also been expanded to include a wide array of contemporary and heritage arts that express something unique about a group's or an individual's world view.

# THE USE OF CULTURAL ASSETS

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- While the decision to enter this industry must be based on tourism considerations, one of the paradoxes of cultural tourism is that the resources it uses are managed by the principles of cultural management (CM), a discipline that includes the subfields of arts management (AM) and cultural heritage management (CHM).
- That is, contemporary arts, tangible and intangible heritage from which cultural assets spring can be subject to the professional management principles and practices of heritage site managers, arts administrators, gallery and museum curators, and more. In addition, many cultural assets may serve a multitude of user groups, including tourists but also including local schoolchildren, traditional owners and other local residents.

# THE TOURIST

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- The tourist is the final element to be considered. Tourists are non-local residents travelling primarily for fun, recreation, escape or to spend time with family and friends (Pearce and Lee 2005).
- They have limited and, usually, fixed time budgets.
- Most are looking to be entertained, while only a small number are looking for deeper learning experiences.
- Most also have a limited knowledge of a destination's cultural heritage and living culture. As such, they are a fundamentally different user group than local residents, with completely different needs and wants.
- Products that suit their needs may be inimical with the needs of local residents.

# THE CULTURAL TOURISM MARKET

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- The cultural tourism market has changed dramatically in the last ten years. Whereas once it was assumed to be homogenous, now it is recognized as being heterogeneous, consisting of a number of clearly defined segments differentiated by the importance of culture as a travel motive and the depth of experience sought.
- Different segments, in turn, seek different products and different experiences, and respond to different marketing messages.

# CULTURAL TOURISTS

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- Who are cultural tourists? This simply question has proven to be difficult to answer because two different philosophical approaches have been used to define the market and its behaviour.
- Each approach produces dramatically different conclusions about its size and importance (Vong 2013). One approach defines the market on the basis of activities pursued in the destination, while another assesses the importance of cultural tourism as a trip motive.
- Marketing consultant Bob Dauner (nd) unintentionally captured the confusion when he used both measures to define the cultural tourism segment as being “comprised of a select group of travelers who either plan a trip to attend a cultural activity or who actively participate in cultural activities while on a trip, even if they are traveling for other reasons”.

# CULTURAL TOURISTS

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- There is a significant difference between someone who visits a cultural attraction regardless of the reasons they chose the destination and someone who was attracted to the destination because of its cultural attributes.
- Part of the problem lies in an efficient but sloppy use of the English language that conflates the two ideas. It is clearly more efficient to use a simple descriptor of 'cultural tourist' when using an activities-based approach, rather than using the more accurate term of a 'tourist who visits an attraction that may or may not reflect the cultural heritage of the destination for reasons that may or may not have anything to do with learning about that attraction's cultural significance'.
- But this term infers trip purpose, in much the same way that labelling someone as a business or transit tourist does, when no such inference can be made.

# CULTURAL TOURISTS

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- A second issue is operational. Most studies that attempt to quantify the size of the market rely on secondary analysis of data gathered by national and state tourism organizations in their departing visitor surveys.
- These surveys consist of a number of sections, including specific questions about trip purpose and activities pursued. Trip purpose questions usually offer a limited number of choices (typically pleasure, business, visiting friends, and maybe one or two other options) and require respondents to select one item only.
- Activity questions include a much larger array of possible answers (up to 120 in some cases) and allow respondents to select all that they or members of their travel party participated in during the visit. Historically 'cultural tourism' is listed rarely, if ever, as a trip purpose option and so researchers had to rely on analysing activity questions to gain a better understanding of what people did in the destination.
- The volume of visitors who participate in activities can be determined by counting participation rates in the set of activities that are thought to be evocative of the specialist interest under examination.

# HOW TOURISM WORKS

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- It is important to understand what tourism is, how it works, why people travel, and what they expect when travelling. One must also appreciate that the benefits and costs of tourism are uneven; not everyone will benefit and not everyone who benefits will benefit equally.
- Tourism is, essentially, a commercial activity. This axiomatic principle seems to be overlooked in much of the literature examining tourism from different academic or intellectual perspectives.
- While tourism may be an interesting intellectual phenomenon, in practice it is a business: a big business.
- Businesses enter the tourism industry in the hopes of making money by offering goods and services to the billions of individuals that travel both domestically and globally each year. The economic advantages that tourism offers as well as the social advantages that follow from its wealth creation are the reasons that destinations embrace it.

# TOURISM IS ENTERTAINMENT

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- Most tourism experiences have their basis in entertainment.
- The tourism product must be controlled and packaged in a way that makes it simple for the general public to consume in order to be successful and subsequently commercially viable (Cohen 1972; McKercher 2003).
- The product frequently needs to be changed in order to offer consistent show times and a guaranteed experience due to constrained tour itineraries, time budgets, and the requirement to handle huge numbers of guests.
- Even institutions like museums and art galleries that were created to promote learning and cultural awareness have realized they are also in the entertainment business and have set up their exhibits accordingly.

# TOURISM IS ENTERTAINMENT

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- Instead of education, edutainment is frequently the expected result because few visitors genuinely wish to engage in profound learning while traveling. The remainder travel for leisure or as an escape, and they are looking for enjoyable activities to partake in.
- Art museums, particularly the larger and sometimes specialist ones, are shaping their experiences in more leisure-focused ways to broaden their market appeal.
- Blockbuster exhibitions can draw record-breaking audiences, while bringing art to the public has been the subject of many smaller exhibitions held at shopping malls and other public spaces (Dicks 2003).

# ATTRACTIONS DRIVE TOURISM

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- Attractions, or demand generators in marketing speak, are what propel travel.
- However, not every tourist destination has the same ability to generate demand. In other words, not every attraction has the same level of commercial appeal.
- There is a definite hierarchy of tourist attractions that can be determined based on how obligated tourists feel to visit them: the more dominant the attraction, the more obligated travelers feel to visit it.
- However, for lower order attractions, when trips to the lowest order ones are characterised by minimal involvement decisions, the purchase decision becomes increasingly discretionary. It's also critical to understand where each attraction falls inside this hierarchy because this will affect both its use and its volume of visitors.

# CULTURAL HERITAGE ATTRACTIONS ARE PART OF TOURISM

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- The tourist mix of every location includes cultural tourism attractions as a key component.
- The fact that the objects they administer have a draw for tourists, however, seems to be something some heritage managers struggle with. As a result, they oppose the introduction of management mechanisms that will maximize the caliber of the experience offered while also minimizing any potential negative effects of tourism.
- Additionally, it means that cultural attractions, particularly if they are classified as lower order attractions, must compete not just with other attractions in the same product class but also with attractions in entirely different product classes.
- Accepting that a cultural heritage tourism attraction is, in fact, a tourism attraction and, as such, must be managed successfully is the first step such, must be managed, at least in part, for tourism use.

# NOT ALL CULTURAL ASSETS ARE CULTURAL TOURIST ATTRACTIONS

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- Communities value and preserve cultural assets for reasons other than their potential for tourism (Jamieson 1994; du Cros 2006b).
- However, that does not inherently imply that they have tourism potential. They might be unique to the area or important local assets.
- However, just because something is listed or culturally mapped does not guarantee that tourists will find it appealing.
- Well-intentioned individuals frequently make costly blunders by exaggerating an asset's perceived tourism worth when it has little appeal. Developing infrastructure and services to accommodate for anticipated tourist use that never materializes wastes valuable resources.

# FACTORS INFLUENCING VISITATION LEVELS

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- Access and proximity dictate the potential number of visitors
  - Demand for tourism products is influenced by a range of factors, including distance (McKercher et al. 2008), market access (Pearce 1989, McKercher 1998), and time availability (McKean et al. 1995). Distance decay theory shows how demand declines exponentially as distance increases, whether it is between the person's home and possible destinations or from the person's hotel and possible attractions.
  - According to market access, demand is affected by the number of comparable and competitive items and destinations that are located between the tourist's residence and the potential product or destination. It has been demonstrated that time availability can enhance or reduce the impact of market access and distance decay.

# FACTORS INFLUENCING VISITATION LEVELS

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- Time constraints have an impact on the level of expertise and experience requested.
- Most travelers have time budgets that are constrained, and many have their time tightly restricted by tours operators, the requirements of kids, other passengers, or flight schedules.
- They only have a certain amount of time at each location, and since they are rational consumers, they will decide how to use that time as efficiently as possible (Shoval and Raveh 2004).
- As a result, many visitors will want to fit in as many experiences as they can throughout their trip, and they'll tend to choose activities that are short, simple, and where they feel like they can be guaranteed an experience.

# TOURIST BEHAVIOUR

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- There is no difference between a tourist and a traveller
  - Often, comments about the benefits or risk of tourism are biased and highly value laden.
  - A case in point is the artificial distinction made between tourists and travellers. Travellers are felt to be the superior type of person who is seeking a deeper experience, while the term tourist is often used in a derogatory fashion to connote someone who is less sophisticated, does not care about the destination, and behaves inappropriately (Leiper 2004).
  - We all want to see ourselves as being special and want to look at our own tourism experience as being unique and so try to disassociate ourselves from the masses. In reality, there is no difference between a tourist and a traveller, other than the observation that ‘I am a traveller, while everyone else is a tourist.’

# TOURIST BEHAVIOUR

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- The tourist experience must be controlled, which in turn controls the actions of the tourist
  - Controlling the travel experience is the most effective strategy to reduce the negative effects of tourism on cultural assets.
  - Standardizing, altering, and commoditizing the visitor experience is the best approach to manage it.
  - This is considered heresy by many, especially in light of the substantial body of literature that criticizes tourism for commodifying and devaluing culture.
  - While ensuring the visitor gets the most out of the experience, standardization, modification, and commercialization of the experience constitute a practical way to manage the flow of people.

# TOURIST BEHAVIOUR

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- Tourists want controlled experiences

- Although it may be challenging for some to understand, the majority of visitors genuinely want their experience to be managed and are open to the asset being presented in a way that makes it simple to consume.
- Because most domestic visitors and the vast majority of visitors from other countries only visit a destination once in their lives, they want to make the most of it.
- By standardizing the presentation, consistency in the experience delivery is guaranteed.
- The addition of value through standardization, modification, and commodification also supports entry charges.

# TOURIST BEHAVIOUR

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- The more mainstream (or mass) the market being targeted, the more quickly and easily the tourism product must be able to be consumed
  - The more mainstream or mass the market being drawn to the attraction is, the easier the product must be to consume.
  - Two factors are at play here. Mainstream tourists are usually motivated by pleasure or escape reasons.
  - They are seeking enjoyable experiences that do not tax them mentally or ideologically.

# TOURIST BEHAVIOUR

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- The mass market has not fractured

- There is a long-standing belief that the mass market has fractured and that we are now in the age of mass individualism. It originated from the convergence of a number of events. However, evidence of the fracturing of the mass market is difficult to come by.
- The idea was promoted initially by the marketing consultant Auliana Poon (1988, 1994) who promoted the idea of 'new tourism' whereby mass tourism was being replaced by a new form of tourism driven by advances in technology, greater sensitivity in consumer tastes, and a new type of tourist who is looking for a more sustainable, authentic experience.
- Her work also coincided with the emergence of alternative tourism, anti-tourism, and other forms of non-mass tourism in the popular lexicon, as affluent baby boomers did not want to be associated with the standard sun, sand and beach holiday they took as children.
- The myth was further enhanced by the popularization of eco-tourism and its promotion by global tourism stakeholders as being reflective of a new form of ethically appropriate activity that attracted a new type of ethically superior tourist.
- The maturation of destination marketing was the second piece of the equation. Traditionally, destination marketers pushed products, but as marketing matured they realized they needed to promote experiences that could satisfy their consumers' needs. What better way to do this than to identify market niches that seemed to evoke experiential responses? Finally, the emergence of easy to use statistical analysis packages permitted researchers to conduct market segmentation studies, often by comparing the profile of people who participated in certain activities with those who did not.

# SEGMENTING THE CULTURAL TOURISM MARKET

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- Segmentation research recognizes that any market consists of a number of groups, each with a slightly different reason for visiting a destination, each having different goals, and each looking for different activities to satisfy these goals (Dolnicar 2007).
- Within these differences, though, some commonalities can also be found, where some groups of tourists are more similar than others. Segmentation, then, tries to divide a heterogeneous market into homogeneous groups of customers who experience a similar problem and react to market stimuli in the same way (Sollner and Rese 2001).
- It must be remembered, though, that segments are not discrete units. Rather, the boundaries between groups may be fuzzy, especially if the segments can be aligned along a continuum.

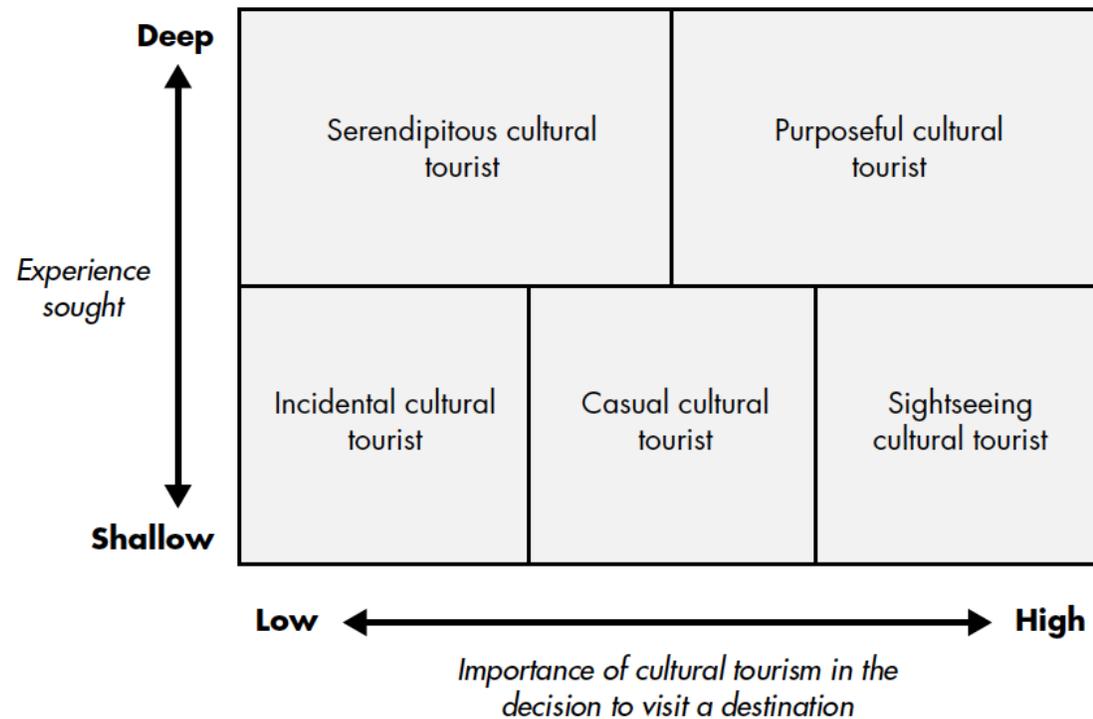
# SEGMENTING THE CULTURAL TOURISM MARKET

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- Members of each segment have clearly identifiable features, the differences between individuals at the edge of segments may be smaller than the differences within each segment (McKercher et al. 2002).
- Segmenting the market permits the destination or product supplier to shape experiences for different groups, optimize promotional efforts and maximize tourist enjoyment (Dolnicar 2007). Ideally, segments should satisfy the following criteria:
  - share common values and interests that are sufficiently different and distinct from other segments;
  - be sufficiently large to give the organization a return for its effort;
  - be easy to reach through promotional media and other marketing activities at an affordable cost;
  - have their needs satisfied by the products being offered.

# SEGMENTING THE CULTURAL TOURISM MARKET

- The cultural tourism market consists of five segments based on the role that culture plays as a



Du Cros, H., & McKercher, B. (2014). *Cultural tourists*. Du Cros, H., & McKercher, B. (2014). *Cultural tourism*. Routledge.

# SEGMENTING THE CULTURAL TOURISM MARKET

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- The importance of cultural tourism in the whole decision-making process for a trip is reflected in the horizontal axis. It acknowledges that even while a tourist may still partake in some cultural activities, the value of culture might range from serving as the primary or sole justification for traveling to having no bearing at all. The depth of experience is represented by the vertical axis. This axis is aware that not all visitors can or desire to have a profound experience. Instead, there may be a variety of experiences. The matrix yields the following five categories of cultural tourist:
  - sightseeing cultural tourism: although a venue is visited for cultural tourism, the experience is only superficial;
  - a tourist who travels for reasons unrelated to cultural tourism but who, as a result of their participation, ends up enjoying a rich cultural tourism experience;
  - casual cultural tourist: culture tourism is a weak reason to travel because the experience that results is limited;
  - An accidental cultural tourist is someone who travels for other reasons than to engage in culture tourism but nonetheless partakes in some activities and has a limited experience.

# SEGMENTING THE CULTURAL TOURISM MARKET

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- The centrality dimension

- A number of studies have shown that the importance of culture in the trip decision process lies along a continuum from those who see it as a critical driving force in their travel decisions to those for whom it plays little or no role in the decision.
- In most cases, the market is dominated by incidental and casual cultural tourism segments with the purposeful segment being the smallest.

- Depth of experience

- Depth of experience or level of engagement is the other dimension to be considered, for not everyone is interested in or capable of having a qualitatively similar experience.

# TYOLOGY

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- A location may contain all five categories of cultural visitors at once. However, the mix of tourist types will differ from one destination to the next based on the location itself, the site being visited inside the location, and the tourist's country of origin.
- Purposeful and sightseeing cultural tourists see their trip as a chance to grow personally, and are motivated to travel more for cultural and educational reasons or to learn about the destination's cultural heritage. By contrast, casual, incidental, and serendipitous cultural tourists travel primarily for recreation, and fun, relaxation, and to spend time with family and friends.
- In addition, a relationship has been noted between type and physical distance travelled or cultural distance encountered. Long haul tourists are far more likely to be represented in the purposeful and sightseeing cultural segments, while short haul international tourists tend to be clustered in the incidental and casual segments.

# TYOLOGY

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- The likelihood that a destination will draw tourists with specific cultural goals increases as the cultural distance between the host culture and the traveler's own culture decreases, while tourists from markets with similar cultures are overrepresented in the incidental and casual segments (McKercher and Chow 2001, Croes and Semrad 2013).
- Different scenario exists with domestic tourists. Here the closer the cultural or heritage attraction is to the core values of the domestic market, the more they reflect durable national ideals or the collective core values of the nation and the greater the likelihood of drawing purposeful or sightseeing cultural tourists.
- Sightseeing and purposeful cultural tourists are motivated to visit to learn about a destination's cultural heritage but are seeking qualitatively different experiences to satisfy that motive.

# TYPOLOGY - Implications for cultural tourism

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- Cultural tourism participation may be a mass market activity but the core or purposeful cultural tourism market is still a small, niche market. Most people who engage in cultural tourism activities see them as lower order complementary activities that enhance the total visitor experience.
- Different approaches and different marketing messages, therefore, are required to appeal to each segment.
- Purposeful cultural tourists need to understand the meaning of the wider cultural connections of the attraction before they experience it. They often conduct extensive research through a wide range of media.

# TYPOLOGY - Implications for cultural tourism

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- Promotional messages targeted at sightseeing cultural tourists are similar to those aimed at the purposeful cultural tourist. They are sensitive to information and want to learn about the attraction.
- They are sensitive to information and want to learn about the attraction. They respond to learn-feel-do calls to action, as they are motivated by learning new things, sightseeing, and experiencing different cultures (Kastenholz et al. 2013).
- However, their level of interest and willingness to engage is much less than the purposeful cultural tourist and, this being the case, materials must focus on the provision of an enjoyable experience rather than a deep learning one.
- Incidental and casual cultural tourists, on the other hand, do not invest heavily in the experience and do not want to be deeply engaged in it.

# TOURIST ATTRACTION SYSTEMS

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- Each plays a fundamental role in explaining how places attract tourists and how tourists consume sites.
- The tourist is the central part of the system, for without tourists places would not be thought of as attractions. He explains that the essence of touristic behaviour involves searching for satisfying experiences away from home, which can be achieved through consuming suitable attractions.
- This issue is critical for it reminds us that successful attractions must be meaningful to tourists.
- Many cultural attractions fail as tourism products because tourists do not understand their significance, consider them common and easily substitutable, or cannot relate to them.

# MARKERS

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- Markers are items of information about the site or nucleus that are communicated to tourists formally or informally and serve as the catalyst for visiting (Culler 1988; Leiper 1990; Olsson 2010).
- They can include, but are not limited to, formal promotional information, advertising and other collateral materials generated by the tourism sector.
- Their intent clearly is to create awareness, stimulate interest, motivate desire, and ultimately induce action. But markers include far more than commercial promotional materials.
- In some cases, the marker itself can become an attraction
- Markers can be found either in the tourist-generating region or in the destination area.
- In a similar manner, online markers can be targeted at tourists in their home country when planning their trip or in the destination region.

# GATEKEEPERS AND KNOWLEDGE BROKERS

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- The terms 'gatekeeper' and 'knowledge broker' are often used interchangeably, for both are involved in gathering information, processing it.
- Collectively gatekeepers may intentionally or unintentionally inform the initial expectations of a holiday, affect activity selection, and influence the quality of experience (Solomon 1997; Palmer 2000).
- Moreover, the type of information provided may be selectively modified to suit the gatekeeper's own needs, to comply with political objectives, to suit the gatekeeper's perceptions of the tourists' needs, or simply out of ignorance (Dahles 2002; Jennings and Weiler 2006; Wong and McKercher 2010).
- Gatekeepers, then, act as mediators that provide or limit access to information, sites and experiences.

# THE ROLE OF GATEKEEPERS IN CONVEYING MESSAGES

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- The chance that the message may be distorted, commodified, or delivered inaccurately increases with the number of gatekeepers involved.
- In order to capture the attention of the customer, cultural values associated with the attraction, for instance, could be trivialized or oversimplified.
- Every gatekeeping stage results in some control over the information being disseminated being lost, which results in some control over the asset being lost.
- The asset loses control over how it is represented, which results in a loss of control over the type of experience that may be anticipated. This is because the asset is unable to ensure that the desired message is communicated to potential visitors in the correct way.

# THE ASSET

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- A intended message can be sent unhindered by direct communication between the asset, or more precisely its administrators, and the visitor.
- Although this circumstance is great, it doesn't happen very often.
- Before most visitors will visit the asset, they need to be made aware of it.
- Destination marketers, tourism businesses, or the travel industry are typically in charge of this awareness-raising process.
- Consequently, it is likely that other gatekeepers will have had some effect in the awareness building process, unless the tourist discovers the asset by accident or has access to limited information obtained by the asset's managers in some way.

# ON-SITE GUIDE

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- The first knowledge gatekeeper who may alter the message is the on-site guide.
- According to studies, there are significant discrepancies in how successfully translators and guides can communicate information to tourists (Ryan and Dewar 1995).
- In order to bring the asset to life and communicate its tale, the visitor depends on the guide. The efficacy of training programs, the effectiveness of individual job descriptions, and the guide's knowledge directly influence the capacity to do this task.
- The quality of the interpretation can be very good in some instances. Experts in archaeology, cultural heritage, art, and related fields effectively engage visitors and deliver a top-notch experience.
- But sometimes the guides are nothing more than a costumed performer assuming a role.

# FRIENDS AND FAMILY

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- The choice of and expectations for the usage of cultural or heritage assets may be significantly influenced by friends and family.
- They are regarded as legitimate "experts" who have traveled to the location in question and are thus qualified to provide guidance.
- However, it's possible that these individuals know little to nothing about a region's cultural norms, much as the person seeking help.
- In fact, friends can be crucial but untrustworthy gatekeepers. If the friends' visit was only a brief vacation, if they were unfamiliar with the local culture, and if they didn't do enough research, then their recommendations will be questioned.

# COMMERCIAL MEDIA

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- There are several travel-related lifestyle, infotainment, and edutainment radio broadcasts, periodicals, and television programs. These gatekeepers defend their existence by serving as resources of information for those wishing to get to the marked locations.
- However, producers are aware that most of their audience will use the product as a vicariously-traveled experience rather than ever visiting the highlighted locations.
- The locations highlighted frequently offer breathtaking landscapes, tranquil settings, upscale resorts, and friendly locals. The cultural aspects that are displayed are frequently done so in a "wow, isn't this magnificent" way or as a theme park attraction.

# TOURISM MEDIA INCLUDING TOURISM SOCIAL NETWORKING SITES

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- There are two types of tourism promotional literature: that presented by destination marketing groups and that presented by independent media.
- Each has a tad bit of a different role. Destination marketing groups provide information with the aim of promoting travel to the area as well as promoting heavy consumption while there.
- The resources of the region are portrayed as goods for consumption. Typically, the message is straightforward and focused.
- Independent media has more freedom to give a more comprehensive and impartial account of the location than content created by publishers like Lonely Planet, Fodor's, or auto associations.

# TOURIST INFORMATION CENTRES

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- The local tourist information centres are often seen as the first point of contact for visitors.
- Their function has not changed over the years, although the media they use have.
- Essentially, their role is to disseminate information to tourists about the destination with the hope of influencing behaviour in a positive manner (Fesenmaier et al. 1993).
- Deery et al. (2007) note that with their expertise in local knowledge, a visit can help reduce uncertainty for visitors whose information needs cannot be fully met by use of the Internet or from other information sources. But their effectiveness depends on the quality, accuracy, and relevance of the information provided by their staff. Deery et al. (2007) indicate that in most regional centres volunteers constitute a large proportion of the staff. While they enjoy engaging with tourists and are generally helpful, they may have limited knowledge.

# LOCAL TOUR OPERATORS

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- The operator offers transportation, admission to sites, commentary, and maybe food and a memento as well.
- Operators of bus excursions, which provide standard sightseeing tours, dominate the market.
- Cultural or historical elements may be included on these trips, but only if they are regarded as iconic sights.
- Some specialized tour companies that only promote cultural, heritage, or ecotourism have emerged in recent years.
- They are frequently modest businesses with little potential for growth. Their purpose is to give the visitor a sample of the sights and sounds of the location.

# TOUR ESCORT

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- For the duration of the tour group's visit, the tour escort stays with them. The tour escort will travel with the group while it is in a country, as opposed to the tour guide who is in charge of the activities at one location.
- The main responsibility of the escort is to see that everything goes according to plan and that any issues are dealt with.
- However, in addition to acting as a local tour guide, this individual also serves as a cultural intermediary, establishing the background for the destinations to be seen and ensuring continuity between them.

# TOUR WHOLESALER

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- The ground material is put together by the tour wholesaler with transportation to offer goods for sale through retail establishments.
- The inbound tour operator may offer the ground content, or, if the wholesaler is sizable enough, it may be assembled independently.
- Although there are a few little specialty tour wholesalers, most of these firms serve the mass market and are high volume, low margin businesses.
- They achieve this by offering a variety of commodified items that are efficient, secure, and profitable to consume.

# RETAIL TRAVEL AGENTS

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- The direct link between the traveler and the experience is provided by retail travel agencies.
- Travel agents continue to serve as, perhaps, the most significant gatekeeper in the decision-making process for travel purchases, even if the Internet is redefining their function. They sell knowledge to customers as their main product or service.
- In making the ultimate buying choice, their recommendations are heavily considered.
- A qualified specialist in meeting their client's travel needs, the travel agent is the most approachable local expert.

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# TOURISM, THE TOURIST, AND STAKEHOLDERS, HOW TOURISM WORKS, THE CULTURAL TOURISM MARKET: A CULTURAL TOURISM TYPOLOGY



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# INTRODUCTION

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- First and foremost, there is such a thing as cultural tourism.
- Tourism is a noun, and the adjective "cultural" modifies it.
- While cultural tourism makes advantage of a destination's cultural resources, it operates under the same principles that govern all other forms of tourism.
- Determining what tourism is, how it functions, and what influences tourism decisions will help you better comprehend cultural tourism.
- Essentially, tourism is a commercial endeavor.
- Although it may be a fascinating intellectual phenomenon, tourism is actually a business.

# TOURISM AS BUSINESS - INTRODUCTION

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- Businesses go into the tourism industry in the hopes of making money by selling goods and services to the billions of people who travel domestically and abroad each year.
- Tourism is a goal for destinations because of the economic advantages it brings as well as the social advantages that follow from its wealth creation.
- States and provinces promote tourism because it brings in additional revenue for their regions.
- Tourism is a highly valued source of foreign exchange, which is why countries pursue it.
- While we might travel to fulfill inner demands like escape, rest, recreation, prestige, or education, places promote tourism for the financial advantages it offers.
- Tourism is unique in that those who facilitate experiences rather than those who supply experiences produce the majority of the revenue.

# TOURISM AS BUSINESS - INTRODUCTION

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- Businesses that generate income from tourism, such as airlines, travel agents, hotels, or tour operators, facilitate consumption of the product but are not the product themselves.
- Only a small fraction of the cost of a tour is spent at what can be called attractions; the rest is spent on transport, accommodation, food, drink, tips, sightseeing, and commissions to the travel trade.
- Yet, it is these attractions that draw the tourist to a region in the first place, enabling the rest of the benefits to accrue.
- One of the great challenges of cultural tourism is that the products tourists seek are often in the public domain and are available free of charge or at minimal cost.

# TOURISM AS EXPERIENCE - INTRODUCTION

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- Tourists satisfy their personal needs by consuming enjoyable experiences
- The desire to partake in experiences is a common trait of all forms of travel, including cultural tourism.
- Tourism activities can be invasive, especially when tourism has been imposed on host communities, and local residents have been turned into tourist attractions against their will.
- Tourists who consume heritage places for their extrinsic tourism values and local residents who use the same places for their intrinsic cultural values have radically differing needs.

# TOURISM AS ENTERTAINMENT - INTRODUCTION

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- The majority of tourist experiences are based on entertainment. The tourism product must be controlled and packaged in a way that makes it simple for the general public to consume if it is to be successful and subsequently commercially sustainable.
- Even institutions like museums and galleries that were created to promote learning and cultural awareness have realized they are also in the entertainment industry and have set up their exhibits accordingly.
- Instead of education, edutainment is frequently the expected result because few visitors genuinely wish to engage in profound learning while traveling.
- Art museums, particularly the larger and sometimes specialist ones, are shaping their experiences in more leisure-focused ways to broaden their market appeal.

# ATTRACTIONS

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- Attractions, or demand generators in marketing speak, are what propel travel.
- However, not every tourist destination has the same ability to generate demand. In other words, not every attraction has the same level of commercial appeal.
- There is a definite hierarchy of tourist attractions that can be determined based on how obligated tourists feel to visit them: the more dominant the attraction, the more obligated travelers feel to visit it.
- Low participation decisions are typical of trips to the lowest order attractions, when the buying decision becomes increasingly discretionary.
- It's also critical to understand where each attraction falls inside this hierarchy because this will affect both its use and its volume of visitors.

# ATTRACTIONS

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- The tourist mix of every location includes cultural tourism attractions as a key component.
- The fact that the objects they administer have a draw for tourists, however, seems to be something some heritage managers struggle with.
- As a result, they oppose the introduction of management mechanisms that will maximize the caliber of the experience offered while also minimizing any potential negative effects of tourism.
- It also means that cultural attractions must not only compete with other attractions in the same product class, but they must also compete with other attractions in completely different product classes, especially if they are regarded as lower order attractions.

# ATTRACTIONS

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- Accepting that a tourist attraction is one that must be managed, at least in part, for tourism purpose is the first step in managing any cultural heritage asset successfully.
- Visitation will take place regardless of whether the neighborhood's historical agency or community wants it and regardless of the management procedures put in place.
- Recognizing this fact requires proactive managers to create management strategies that will satisfy the requirements, wants, and desires of tourists while preserving the cultural significance and integrity of the asset.
- Communities value and preserve cultural resources for reasons other than their potential for tourism.

# ATTRACTIONS – WORLD HERITAGE

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- Many destinations chase World Heritage status or some other international designation in the belief that the granting of such status will give the asset top brand recognition and generate significant visitation.
- But the relationship between World Heritage designation and increased visitation is not absolute.
- Its impact depends on a number of other factors, including proximity to markets, prior fame, clustering of attractions, and the like.

# FACTORS INFLUENCING VISITATION LEVELS

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- Demand for tourism products is influenced by a range of factors, including distance, market access, and time availability.
- Distance decay theory shows how demand declines exponentially as distance increases, whether it is between the person's home and possible destinations or from the person's hotel and possible attractions.
- According to market access, demand is affected by the number of comparable and competitive items and destinations that are located between the tourist's residence and the potential product or destination.
- It has been demonstrated that time availability can enhance or reduce the impact of market access and distance decay.

# FACTORS INFLUENCING VISITATION LEVELS

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- An asset's utilization will be influenced by how close it is to a significant population base, a popular tourist destination, or a gateway (such as an airport or other transportation hub).
- Demand in turn affects the asset's capacity for generating income, which in turn should have an impact on the size, stage of development, and amount of investment.
- Attractions that are easily accessible will see higher levels of visitors than inaccessible assets, unless the need to visit them is so great that distance is not a factor.
- For example, museums situated in tourist hotspots or downtown regions will see more visitors than solitary museums situated in the outskirts.

# FACTORS INFLUENCING VISITATION LEVELS

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- Most travelers have time constraints, and many have their schedules firmly dictated by tour guides, children's requirements, the needs of other passengers, or flight timetables.
- They only have a certain amount of time to spend at each location, and since they are sensible consumers, they will decide how to make the most of it.
- The amount of time a visitor is willing to devote to experiences will depend on the quantity of free time available and the number of potential competing uses for that time, particularly when culture constitutes an incidental feature of the trip.

# TOURIST BEHAVIOUR

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- There is no difference between a tourist and a traveller.
- Often, comments about the benefits or risk of tourism are biased and highly value laden.
- A case in point is the artificial distinction made between tourists and travellers.
- Travellers are felt to be the superior type of person who is seeking a deeper experience, while the term tourist is often used in a derogatory fashion to connote someone who is less sophisticated, does not care about the destination, and behaves inappropriately.

# TOURIST BEHAVIOUR

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- Controlling the travel experience is the most effective strategy to reduce the negative effects of tourism on cultural assets.
- Standardizing, altering, and commoditizing the visitor experience is the best approach to manage it.
- This is considered heresy by many, especially in light of the substantial body of literature that criticizes tourism for commodifying and devaluing culture. While ensuring the visitor gets the most out of the experience, standardization, modification, and commercialization of the experience constitute a practical way to manage the flow of people.

# TOURIST BEHAVIOUR

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- The issue has been and still is that the tourism sector standardizes and commercializes the experience for the profit of tour operators rather than asset managers or asset owners who would best understand and safeguard the fabric of the asset.
- Controlling the experience on-site and regaining control from the tour operator or its personnel is a difficulty for the asset management or museum board.
- Although it may be challenging for some to understand, the majority of tourists genuinely want their experience to be managed and are open to having the asset presented in a way that allows simple consumption.

# TOURIST BEHAVIOUR

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- Standardizing the presentation ensures consistency in experience delivery.
- A cost for entrance is also appropriate when standardization, modification, and commodification contribute value.
- The easier the product is to consume, the more mainstream or mass the market being drawn to the appeal is. Here, there are two things at work:
- Most mainstream travelers are driven by a desire for pleasure or an escape. They are looking for fun activities that won't strain their minds or ideologies.
- Many of these individuals will also have little to no knowledge of the resources they are visiting because they have never been there or do not originate from the area they are visiting.

# TOURIST BEHAVIOUR

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- There is a long-standing belief that the mass market has fractured and that we are now in the age of mass individualism. It originated from the convergence of a number of events.
- A market does exist for the person who is seeking a deeper experience, but it tends to be rather small. Specialist educational products, voluntourism, history-themed tours, cooking and handicraft workshops appeal to this type of consumer.
- But, the deep tourist represents only a tiny portion of any specialist market, sometimes 2 percent or less.

# A CULTURAL TOURISM TYPOLOGY - INTRODUCTION

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- Our knowledge of the cultural tourism market has changed dramatically in the last ten years.
- Whereas once it was assumed to be homogenous, now it is recognized as being heterogeneous, consisting of a number of clearly defined segments differentiated by the importance of culture as a travel motive and the depth of experience sought.
- Different segments, in turn, seek different products and different experiences, and respond to different marketing messages.
- There is a significant difference between someone who visits a cultural attraction regardless of the reasons they chose the destination and someone who was attracted to the destination because of its cultural attributes.

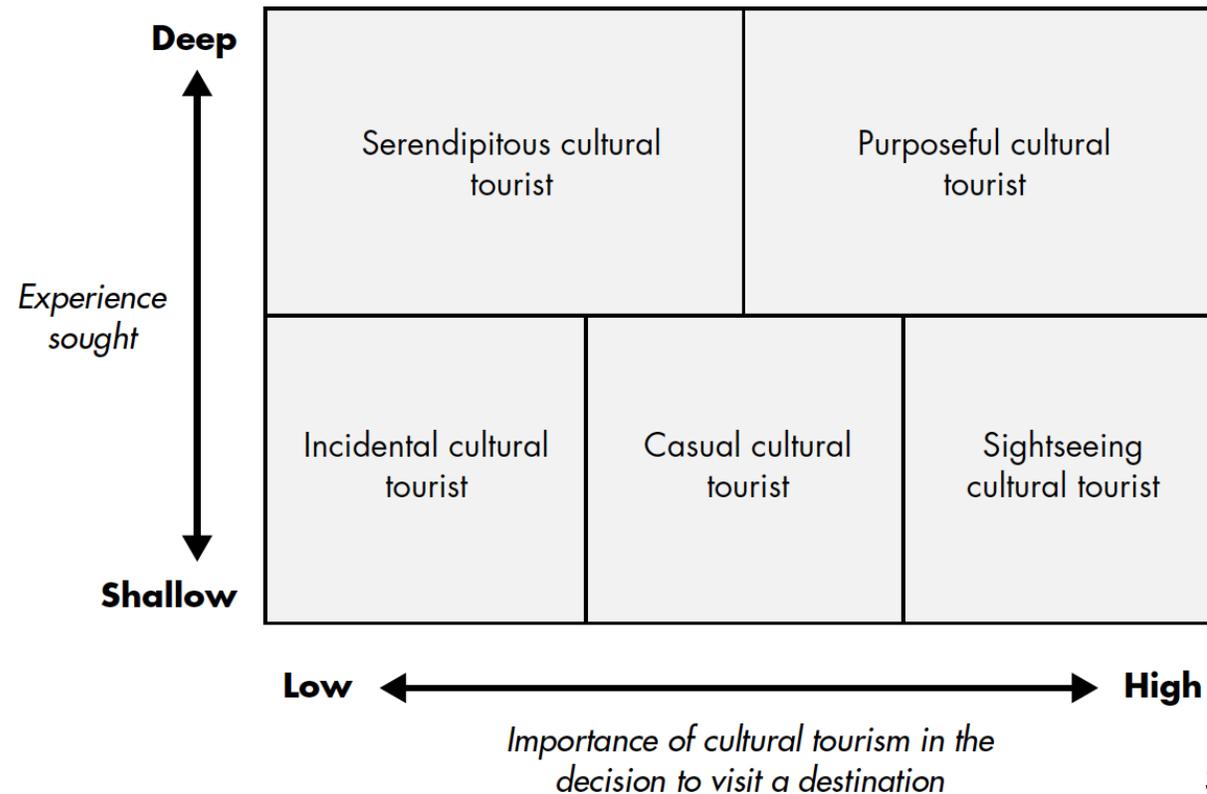
# SEGMENTING THE CULTURAL TOURISM MARKET

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- Segmentation research recognizes that any market consists of a number of groups, each with a slightly different reason for visiting a destination, each having different goals, and each looking for different activities to satisfy these goals.
- Within these differences, though, some commonalities can also be found, where some groups of tourists are more similar than others.
- Segmentation, then, tries to divide a heterogeneous market into homogeneous groups of customers who experience a similar problem and react to market stimuli in the same way.
- It must be remembered, though, that segments are not discrete units. Rather, the boundaries between groups may be fuzzy, especially if the segments can be aligned along a continuum.

# A CULTURAL TOURIST TYPOLOGY

- The cultural tourism market consists of five segments based on the role that culture plays as a trip motivator and the depth of experience.



Source: Hilary & McKercher (2014)

# DEPTH OF EXPERIENCE

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- Depth of experience or level of engagement is the other dimension to be considered, for not everyone is interested in or capable of having a qualitatively similar experience.
- Experiences are not absolute, though. Instead the degree to which a tourist can and will engage in a cultural experience is influenced in part by motivation but also by connectivity with the experience and level of participation.
- An individual's capacity to have a deep experience at cultural attractions is also affected by a number of factors, including time availability, prior knowledge, cultural affinity with the asset, education level, and other issues.

# A CULTURAL TOURIST TYPOLOGY

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- All five types of cultural tourists can be found simultaneously in a destination.
- A relationship has been noted between type and physical distance travelled or cultural distance encountered.
- Long haul tourists are far more likely to be represented in the purposeful and sightseeing cultural segments, while short haul international tourists tend to be clustered in the incidental and casual segments.
- The likelihood that a destination will draw purposeful cultural tourists also increases with the cultural distance between the host culture and the traveler's own culture, whereas visitors from markets with similar cultures are overrepresented in the incidental and casual categories.

# CASUAL CULTURAL TOURISTS

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- Casual and incidental markets prefer low engagement and low involvement cultural experiences that highlight fun, enjoyment, and the opportunity to spend time with family and friends.
- They want highly commodified experiences such as theme parks, festivals, large public art galleries, and museums.
- Their preferences tend towards popular culture, arts, and performance.
- Physically or architecturally impressive built heritage appeals to them, while shopping is as important as visiting cultural sites.

# INCIDENTAL CULTURAL TOURISTS

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- Incidental cultural tourists go to convenience-based attractions that are in tourist hotspots, are simple to consume, and are not very emotionally or intellectually taxing.
- Space and science museums are appealing, as are theme park experiences but only if they are positioned as one of the destination's icon attractions. Here, as well, the experience will be superficial.

# SERENDIPITOUS CULTURAL TOURISTS

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- The behaviour of serendipitous cultural tourists is the hardest to describe in general terms.
- Their experiences seem to involve an element of exploration whereby the individual comes upon a site, attraction, or performance and is enthralled by it.
- They are the most inquisitive of all tourists and tend to spend the longest time at individual places once they visit.

# PURPOSEFUL CULTURAL TOURISTS

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- Sightseeing and purposeful cultural tourists are motivated to visit to learn about a destination's cultural heritage but are seeking qualitatively different experiences to satisfy that motive.
- The purposeful cultural tourist is the greatest consumer of museum experiences, in general, and of fine arts museums, art galleries, pottery museums, and high culture in particular.
- He or she also chooses to visit lesser-known temples and heritage assets and seeks to immerse him or herself in the local culture by going to local food markets.
- He or she also tends to spend a long time at each place, learning about its features.

# SIGHTSEEING CULTURAL TOURISTS

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- On the other side, a sightseeing or cultural tourist is more interested in sampling a variety of activities than in delving deeply into any particular one.
- More important than the depth of any one experience is the total number of experiences that are had.
- This type of traveler is most likely to visit landmark attractions and to explore the entire region.
- It has been noted that sightseeing and taking in the street scene are common hobbies.
- They are the most active and prefer sightseeing to shopping.
- They will also be the ones with the most photos in their blogs and social media sites of the key cultural tourism attractions and experiences.

# IMPLICATIONS FOR CULTURAL TOURISM

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- Most people who engage in cultural tourism activities see them as lower order complementary activities that enhance the total visitor experience.
- Different approaches and different marketing messages, therefore, are required to appeal to each segment.
- Purposeful cultural tourists need to understand the meaning of the wider cultural connections of the attraction before they experience it.
- They often conduct extensive research through a wide range of media.

# IMPLICATIONS FOR CULTURAL TOURISM

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- Promotional messages targeted at sightseeing cultural tourists are similar to those aimed at the purposeful cultural tourist.
- They are sensitive to information and want to learn about the attraction. They respond to learn-feel-do calls to action, as they are motivated by learning new things, sightseeing, and experiencing different cultures.
- However, their level of interest and willingness to engage is much less than the purposeful cultural tourist and, this being the case, materials must focus on the provision of an enjoyable experience rather than a deep learning one.

# IMPLICATIONS FOR CULTURAL TOURISM

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- Incidental and casual cultural tourists, on the other hand, do not invest heavily in the experience and do not want to be deeply engaged in it..
- They are motivated by activities that entertain or inspire awe, and appear willing to engage in cultural activities if they reflect positively on the destination's core image.
- Novelty seeking is important but they base their cultural experiences on well-known attractions.
- Convenience is critical as they will not travel to out of the way places if other activities more easily accessible at the destination have higher importance.
- Promotional messages that encourage people to 'come and enjoy' and marketing tactics that emphasize do-learn-feel or partake in 'delightful experiences' have proven to be effective.
- Advertising also works that emphasizes the age, uniqueness or otherwise, or exceptional characteristics of a place.

# TOURIST ATTRACTIONS SYSTEM, MARKERS, AND GATEKEEPERS

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- Having a significant cultural asset means little if nobody knows about it.
- Tourist attraction as a system comprising three elements: a tourist, a nucleus or attraction, and a marker.
- Each plays a fundamental role in explaining how places attract tourists and how tourists consume sites.
- The tourist is the central part of the system, for without tourists places would not be thought of as attractions.
- Many cultural attractions fail as tourism products because tourists do not understand their significance, consider them common and easily substitutable, or cannot relate to them.

# TOURIST ATTRACTION SYSTEMS

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- The nucleus itself represents the second element of the attractions system.
- A nucleus is defined as any feature or characteristic of a place that a traveller contemplates visiting or actually visits.
- The use of the word 'nucleus' rather than 'attraction' is intentional, for it deviates significantly from accepted definitions of attractions as specific, named places that are managed for tourists.
- Instead, a nucleus is a broader term which captures the touristic experience more fully.
- Enjoying streetscapes, wandering through historic neighbourhoods, eating different foods, or participating in activities that are developed primarily for the benefit of local residents (such as local festivals) are legitimate and highly sought after tourism activities that do not fit the standard definition of an attraction.

# MARKERS

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- Markers are items of information about the site or nucleus that are communicated to tourists formally or informally and serve as the catalyst for visiting.
- They can include, but are not limited to, formal promotional information, advertising and other collateral materials generated by the tourism sector.
- Their intent clearly is to create awareness, stimulate interest, motivate desire, and ultimately induce action.
- But markers include far more than commercial promotional materials.
- In some cases, the marker itself can become an attraction.

# GATEKEEPERS AND KNOWLEDGE BROKERS

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- The terms 'gatekeeper' and 'knowledge broker' are often used interchangeably, for both are involved in gathering information, processing it.
- Collectively gatekeepers may intentionally or unintentionally inform the initial expectations of a holiday, affect activity selection, and influence the quality of experience.
- Moreover, the type of information provided may be selectively modified to suit the gatekeeper's own needs, to comply with political objectives, to suit the gatekeeper's perceptions of the tourists' needs, or simply out of ignorance.
- Gatekeepers, then, act as mediators that provide or limit access to information, sites and experiences.

# GATEKEEPERS AND KNOWLEDGE BROKERS

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- The guide is expected to channel people into the right places at the right times to produce controlled experiences designed to create a positive impression of the country and shield tourists from its politically less palatable aspects.
- Such actions can undermine the provision of alternative histories or messages by individuals or groups who are not members of the power elite.
- At other times it can be more subtle, whereby the manner in which information is provided or withheld can add an affective dimension that reinforces or overpowers the spoken word.
- Who are these gatekeepers? They comprise all potential intermediaries who advise tourists at all stages of the trip.

# THE ROLE OF GATEKEEPERS IN CONVEYING MESSAGES

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- The chance that the message may be distorted, commodified, or delivered inaccurately increases with the number of gatekeepers involved.
- In order to capture the attention of the customer, cultural values associated with the attraction, for instance, could be trivialized or oversimplified.
- As a result, some control over the information that is transmitted is lost at every gatekeeping level, which also results in some control over the asset being lost.
- The asset loses control over how it is represented, which results in a loss of control over the type of experience that may be anticipated. This is because the asset is unable to ensure that the desired message is communicated to potential visitors in the correct way.

# THE ROLE OF GATEKEEPERS IN CONVEYING MESSAGES

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- The gatekeeping procedure includes these five elements in general.
- First, the number of intervening gatekeepers who are likely to be involved increases with the physical distance between the visitor and the destination. The employment of a retail travel agent is frequently required when booking accommodations and flights from a distance, which opens up the possibility of buying a fully or partially packaged vacation.
- Second, the more gatekeepers are utilized or the wider the scope of the information search, the less the individual knows about the location being visited. For instance, first-time tourists are much more inclined to buy local tours than are return visitors, and they are also more likely to look for more travel information. Most tourists who are unfamiliar with their destination will utilize a travel agent.
- Third, a visitor is more likely to rely on a gatekeeper to provide information about the destination's culture or history the less informed they are about it.
- Fourth, there are more gatekeepers because tourists depend more on the for-profit tourism industry.
- Fifth and finally, the emergence of social networking sites and Web 2.0 technologies has effectively removed much personal interaction from the gatekeeping process. Whereas once a tourist could rely on a trusted travel agent who he or she knew, today the tourist often has to rely on an anonymous third party.

# THE ASSET

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- The asset serves as the discussion's focal point.
- Direct communication between the asset, or more precisely its managers, and the visitor allows for the unhindered delivery of a desired message.
- The message was sent clearly. This is the ideal condition, but it doesn't happen very often.
- Before they will visit, the majority of visitors need to be made aware of the asset.
- The travel industry, tourism businesses, or destination marketers are typically in charge of this awareness-raising effort.
- Unless the visitor accidentally discovers the asset or gains access to confidential data obtained by the asset's administrators, it is likely that other gatekeepers have had some role in the process of raising awareness.

# ON-SITE GUIDE

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- The first knowledge gatekeeper who has the authority to change the message is the on-site guide.
- According to studies, there are significant disparities in how efficiently interpreters and guides can enlighten tourists.
- The guide's ability to bring the asset to life and narrate its story is crucial for the tourist.
- The success of training programs, the quality of job descriptions, and the guide's own knowledge all directly affect the ability to do so.
- The quality of the interpretation is sometimes really good.
- Archaeologists, experts in cultural heritage, the arts, and others effectively engage visitors and deliver a top-notch experience.

# FRIENDS AND FAMILY

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- When choosing which cultural or heritage assets to use and setting expectations for their use, friends and family may have a significant impact.
- They are well-known, reputable "experts" who have been to the location in question and are thus competent to provide guidance.
- However, it's possible that these folks have the same lack of knowledge about a region's cultural values as the one seeking guidance. Friends are frequently crucial but unreliable gatekeepers, it is true.
- Friends' recommendations should be taken with a grain of salt if their trip was only a brief vacation, if they lack sufficient background knowledge regarding the local culture, and if they did not do enough study.

# COMMERCIAL MEDIA

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- There are several travel-related lifestyle, infotainment, and edutainment radio broadcasts, periodicals, and television programs.
- These gatekeepers defend their existence by serving as resources of information for those wishing to get to the marked locations. However, producers are aware that most of their audience will use the product as a vicariously-traveled experience rather than ever visiting the highlighted locations.
- The locations highlighted frequently offer breathtaking landscapes, tranquil settings, upscale resorts, and friendly locals.
- The cultural aspects that are displayed are frequently done so in a "wow, isn't this magnificent" way or as a theme park attraction. Destinations are therefore either highly romanticized or very commodified, with their attributes being marketed as consumables.

# TOURISM MEDIA INCLUDING TOURISM SOCIAL NETWORKING SITES

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- There are two types of tourism promotional literature: that presented by destination marketing groups and that presented by independent media.
- Each has a tad bit of a different role. Destination marketing groups provide information with the aim of promoting travel to the area as well as promoting heavy consumption while there.
- The resources of the region are portrayed as goods for consumption.
- Typically, the message is straightforward and focused.

# TOURISM MEDIA INCLUDING TOURISM SOCIAL NETWORKING SITES

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- Social networking sites are playing an increasingly important role as gatekeepers, for many people see the type of information shared on these sites as being more reliable and unbiased than materials posted by some DMOs.
- Traditionally, the message was controlled by the DMO with a vested interest in providing information in a controlled and predictable manner. However, the emergence of many social networking sites has shifted that power balance to the extent that citizen reporters can share their own experiences and impressions about places being visited.
- DMOs and tourist industry must now compete with a wide range of non-commercial materials posted by tourists, to the extent that these information providers are now felt to exert a significant influence on the tourist's decision-making behaviour

# TOURIST INFORMATION CENTRES

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- The local tourist information centres are often seen as the first point of contact for visitors.
- Their function has not changed over the years, although the media they use have.
- Essentially, their role is to disseminate information to tourists about the destination with the hope of influencing behaviour in a positive manner.
- Breadth of knowledge related to apparent awareness of the range of activities, options and places to visit, while depth of knowledge related to the specific significance of individual sites.

# TOURIST INFORMATION CENTRES

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- Moreover, questions were raised about the breadth and depth of knowledge of information centre staff.
- Breadth of knowledge related to apparent awareness of the range of activities, options and places to visit, while depth of knowledge related to the specific significance of individual sites.
- While some staff could identify a progressively deeper range of lower order attractions, many others could not or would not progress beyond the main attractions.
- Study participants also observed that depth of knowledge relating to the cultural significance of places tended to relate to the extrinsic appeal of such places as tourist attractions rather than to their intrinsic cultural or heritage values.
- Participants were advised to visit historic sites because they were ‘very famous’, ‘important’, ‘significant’ or ‘nice’ But, when pressed for more details, few answers were provided. Indeed, the lack of knowledge led to the demarketing of some places because when study participants asked about specific lower order attractions they were encouraged not to go.

# LOCAL TOUR OPERATORS

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- The operator offers transportation, admission to sites, commentary, and maybe food and a memento as well.
- Operators of bus excursions, which provide standard sightseeing tours, dominate the market.
- Cultural or historical elements may be included on these trips, but only if they are regarded as iconic sights. Some specialized tour companies that only promote cultural, heritage, or ecotourism have emerged in recent years.
- They are frequently modest businesses with little potential for growth. Their purpose is to give the visitor a sample of the sights and sounds of the location.
- Most involve a series of quick stops at important landmarks or areas of interest, limiting visitors to simple sightseeing, taking photos, and using the restroom.

# LOCAL TOUR OPERATORS

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- Tour guides are known as cultural brokers and are acknowledged as being crucial in conveying information to tourists as well as creating the experience.
- However, a commercial bus license is the most crucial requirement for becoming a local tour operator or guide. Finding a tour guide with professional training in history or CHM is uncommon. In fact, the majority of knowledge comes from the guide's own initiative, local expertise, or the successful completion of a brief internal or external training program.
- However, some alternatives to this arrangement have emerged in places where community- based tourism projects have been linked to training programmes, or specialist training programmes have been initiated or funded by UNESCO, government development aid, or not-for-profit organizations.

# TOUR ESCORT

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- For the duration of the tour group's visit, the tour escort stays with them. The tour escort will travel with the group while it is in a country, as opposed to the tour guide who is in charge of the activities at one location.
- The main responsibility of the escort is to see that everything goes according to plan and that any issues are dealt with.
- However, in addition to acting as a local tour guide, this individual also serves as a cultural intermediary, establishing the background for the destinations to be seen and ensuring continuity between them.

# INBOUND TOUR OPERATOR

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- The following set of gatekeepers is known as "the travel trade" and is made up of insiders.
- Through a variety of business agreements, they serve as a conduit between customers and producers.
- For international wholesalers and travel agents, the inbound tour operator puts together the land portion of a trip.
- Thus, the position is comparable to that of a tiny factory who puts together parts to create a finished good.
- The incoming tour operator must create a compelling package and sell it distinctively if they are to thrive.
- An in-depth cultural tourism experience becomes a low order goal unless the travel package has a cultural emphasis.

# TOUR WHOLESALER

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- The ground material is put together by the tour wholesaler with transportation to offer goods for sale through retail establishments.
- The inbound tour operator may offer the ground content, or, if the wholesaler is sizable enough, it may be assembled independently.
- Although there are a few little specialty tour wholesalers, most of these firms serve the mass market and are high volume, low margin businesses.
- They achieve this by offering a range of commodified, standardised, and regularized items that can be used profitably, effectively, and safely.
- Spending a lot of time at one location is not as significant as seeing a lot of locations or doing a lot of activities in a short amount of time.

# TOUR WHOLESALER

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- Space restrictions on brochures and/or websites limit the amount of information tour wholesalers can impart.
- An analysis of web markers produced by tour wholesalers suggests that the branding of the tour assumes greater or equal importance to the component destinations, while the destinations themselves take precedence over specific attractions within any destination.
- Moreover, tours are promoted as a chance for visitors to explore a region, engage in a long journey, or visit the great sites of a particular destination area.
- Scarce details are provided about specific attractions and when included tend to focus on icon sites. Likewise, photographs are limited to scenic views and the text tends to be passive, suggesting people can enjoy or see various places, but not really engage the destination. In short, they are marked as appealing to either the sightseeing, casual, or incidental cultural tourist.

# RETAIL TRAVEL AGENTS

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- Retail travel agents serve as the tourist's direct point of contact with the travel experience.
- Travel agents still serve as, perhaps, the most significant gatekeeper in the decision-making process for travel purchases, notwithstanding the Internet's influence on this.
- Their expertise is what they specialize in, and it is this expertise that they sell to customers. The final purchase decision heavily relies on their recommendations.
- The travel agent stands for the most approachable local specialist who is skilled in meeting the demands of their customers.

# RETAIL TRAVEL AGENTS

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- Many consumers are unaware that recommendations made by agents may be affected by agent self-interest just as much as by client demands.
- Agency margins are quite small and are constantly increasing smaller.
- They must sell successful goods if they want to exist.
- Products that give the greatest commission rates or take the least amount of time to book are profitable.
- Most retail travel agents must look at mass tourism offerings offered by significant national or international organizations first due to cost reasons.
- Unless the tour is specifically requested, few will look for small, specialized tour operators who might offer the kind of cultural tour that customers prefer.

# RETAIL TRAVEL AGENTS

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- Agents learn about locations from the literature that tour wholesalers provide them with or, if they're lucky, by taking part in familiarization excursions that are organized by the wholesaler or the local DMO.
- As previously mentioned, they serve as reliable sources of intelligence about locations, but their expertise is restricted to the goods they sell and the information given to them by their suppliers.
- Because of this, individuals have a propensity to treat travel places like products and its assets like goods that can be bought and consumed while traveling.

# EFFECT OF MULTIPLE GATEKEEPERS ON THE MESSAGE ASSESSED TO THE TOURIST

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- Each gatekeeper has a different geographic proximity to the asset (close to far), varying levels of contact with the asset (frequent to infrequent/never), varying degrees of awareness of it (may be aware or may have never heard of it before), varying degrees of knowledge (high to none), and varying motivations for wanting to share specific information (to sell a product, to induce visitation, to impart knowledge).
- Furthermore, the persons participating at each gatekeeper level will have varied interests, educational backgrounds, employment, clients they must serve, and professional obligations for how they depict the asset.

# EFFECT OF MULTIPLE GATEKEEPERS ON THE MESSAGE ASSESSED TO THE TOURIST

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- At various levels of the communication chain, the focus, purpose, and information requirements vary dramatically.
- CHM objectives grow more important the closer the gatekeeper is to the asset.
- On the other side, the closer the gatekeeper is to the visitor, the more the gatekeeper is concerned with the tourism product.
- The sort of communication conveyed will probably be very different as a result of these various professional roles and expertise levels.
- The manager of cultural heritage will be motivated to spread information that supports the asset's cultural values.
- To assist in making a sale, the tourism expert will convey a persuasive message.

# EFFECT OF MULTIPLE GATEKEEPERS ON THE MESSAGE ASSESSED TO THE TOURIST

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- The asset management may lose control over the message being given and the manner in which it is being conveyed at any level of the gatekeeping process for heritage assets, in particular when the following characteristics take place:
- The desired message is distorted as it is reinterpreted and represented by an increasing number of gatekeepers; it is simplified as the messenger becomes less aware of cultural values and more aware of tourism products; it is communicated in the cultural context of the potential visitor rather than in the cultural context of the destination area; and it is commodified to make it easier to communicate it to the consumer and to position the asset in a more appealing way.

# EFFECT OF MULTIPLE GATEKEEPERS ON THE MESSAGE ASSESSED TO THE TOURIST

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- Each stage of the gatekeeping process for heritage assets might have the following characteristics, in particular:
- the neglect of less significant assets (those that gatekeepers view as secondary or tertiary attractions), while the primary attractions are emphasized; expectations about swiftly consuming the product rise, preventing the building of expectations for a profound experience;
- messenger gradually loses product knowledge and hence loses the ability to communicate details;
- messenger gradually shows a greater interest in the tourist message than in the arts or heritage message.

# Main Source

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- HILARY, D. C., & MCKERCHER, B. (2014). Cultural tourism.
- Further readings:
  - McKercher, B., & Du Cros, H. (2002). *Cultural tourism: The partnership between tourism and cultural heritage management*. Routledge.
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# CULTURAL ASSETS: CULTURAL HERITAGE MANAGEMENT, TANGIBLE AND INTANGIBLE CULTURAL HERITAGE, CONVENTIONS, CODES, CHARTERS, AND DECLARATIONS



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Evropské strukturální a investiční fondy  
Operační program Výzkum, vývoj a vzdělávání



# CULTURAL HERITAGE MANAGEMENT PRINCIPLES AND PRACTICE

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- CM includes the subcategories CHM and AM.
- The systematic preservation of cultural qualities in heritage assets for the enjoyment of current and future generations is known as CHM.
- As a result, it serves as both a management process and a management philosophy.
- The majority of nations have incorporated these concepts into recognized heritage management strategies or formal legislation that protects cultural heritage.
- There is more recognition of tourism as a user of heritage, which increases the pressure on all stakeholders to work together (UNESCO WHC 2014a; ICOMOS ICTC 2014; World Monuments Fund 2014).

# CULTURAL HERITAGE MANAGEMENT

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- The term 'cultural heritage management' is used commonly in most jurisdictions, except in the United States, where the terms 'cultural resource management' and sometimes 'heritage resource stewardship' are used.
- The use of the word 'heritage' instead of 'resources' signifies subtle but important differences in meaning.
- 'Resources' implies that the asset being considered has an economic, extrinsic or use value that can be exploited.
- 'Heritage', on the other hand, is a much broader term that recognizes the non-economic, intrinsic and social values of the asset in question. In doing so, it acknowledges further a legacy with certain obligations and responsibilities.

# CULTURAL HERITAGE MANAGEMENT

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- The main goal of CHM is to conserve a representative sample of our tangible and intangible heritage for future generations.
- This issue is important for two reasons.
- First, the speed with which the world is changing is so fast that much of our heritage is at risk of being lost either through its physical destruction or the loss of knowledge.
- CHM seeks to establish a formal system to identify and conserve this heritage for the future.
- Equally important, the use of the term 'representative sample' acknowledges that not everything can or should be conserved, only the best or most representative of all that has gone before.

# CULTURAL HERITAGE MANAGEMENT

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- People have always left behind a variety of customs and tangible artifacts, some of which are non-renewable and each specific to its era.
- There will never be another actual Titanic, Angkor Wat, Egyptian, or Peat Bog Iron Age burial.
- They were produced in a unique set of social, cultural, and economic conditions that cannot be imitated.
- When a cultural heritage asset is acknowledged to be of significant cultural value, it is crucial to preserve it so that future generations can witness and comprehend it.
- While we might not run out of legacy, we might lose some of it entirely or become overburdened by others in a way that creates an unbalanced image of a culture or era in history.

# CULTURAL HERITAGE MANAGEMENT

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- What is to be conserved, though, is broad.
- The focus is often on conserving iconic cultural assets, but a truly representative sample must also include more mundane examples that represent normal daily life, values or traditions.
- Here, age is less important than knowing the full story, for that it is vital to conserve a representative sample of contemporary assets that are evocative of early twenty-first century life as it will become tomorrow's heritage (for instance, designer handbags, and the first smart-phones).

# CULTURAL HERITAGE MANAGEMENT

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- Conservation has a different connotation than preservation.
- While preservation implies keeping something safe from harm or loss, often by hiding it away, conservation implies the wise use of resources.
- A key element of CHM then is to make conserved heritage accessible physically and intellectually for use, enjoyment and education.
- As such, cultural heritage managers are expected to plan for a heritage asset's presentation and interpretation as an important part of its ongoing conservation and management.
- English Heritage (2011) argues that making cultural assets accessible is part of a virtuous cycle of heritage management.
- By enabling people to access heritage, they can then understand its meaning, which in turn, helps them to appreciate its value and why it should be cared for, which in turn helps people enjoy it. And the circle continues.

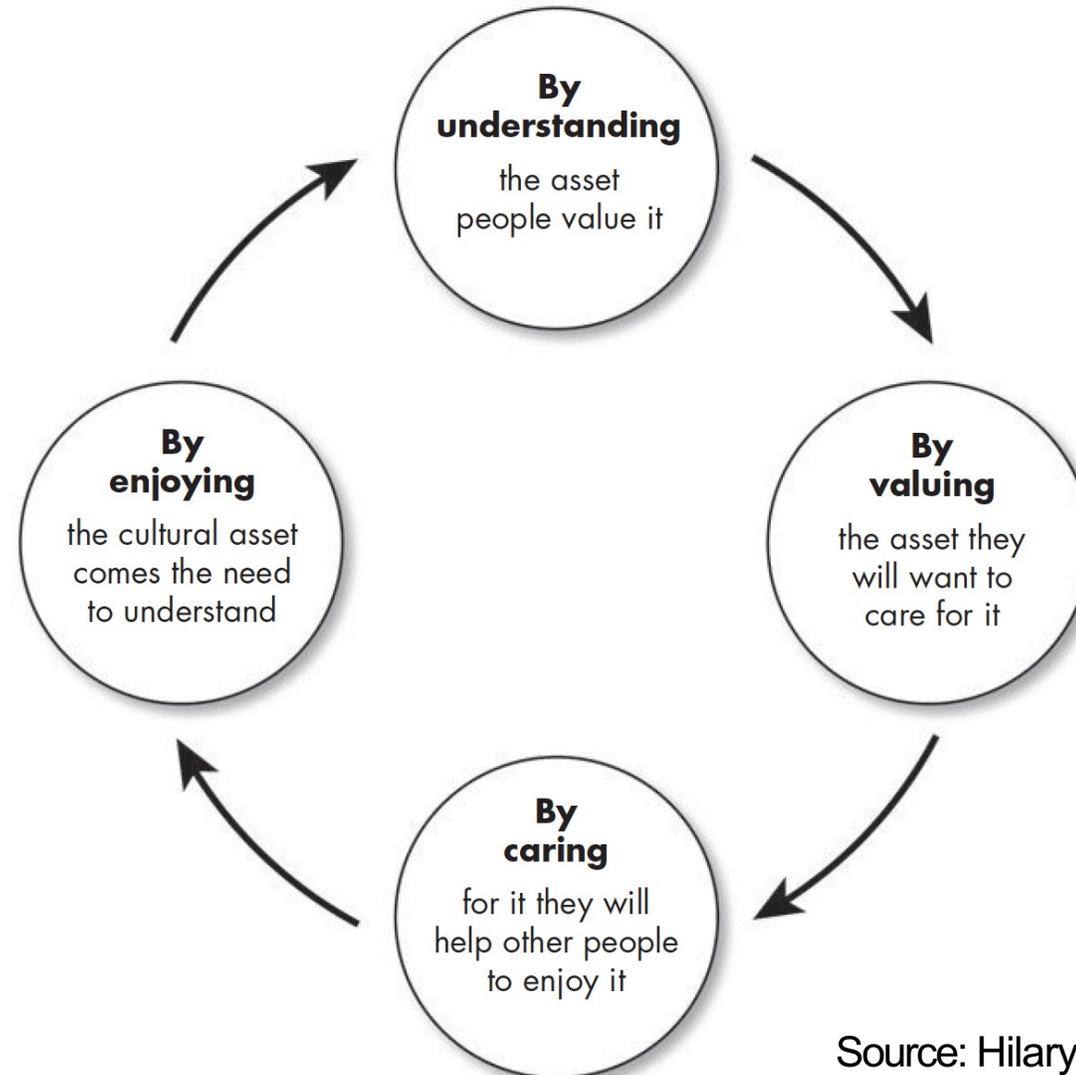
# CULTURAL HERITAGE MANAGEMENT

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- When considering the sustainable use of this heritage asset, we must consider the amount and type of use that is possible before the intrinsic values are threatened.
- However, setting use limits is more easily said than achieved, for each asset has its own meaning and cultural significance and exists in a different social or cultural context.
- In addition, many publicly owned assets have a management mandate that encourages visitation.
- Thus, while broad guidelines and protocols can be developed, each asset must be considered individually. In the next chapter, we discuss how different cultures have differing views about how much change can occur before an asset ceases to be authentic.
- Moreover, fragile sites may require more stringent management actions regarding visitation, regardless of their appeal, while more robust sites can withstand heavier visitation. In other instances, the range of permitted uses might need to be limited.

# CULTURAL HERITAGE MANAGEMENT

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Source: Hilary & McKercher (2014)

# CULTURAL HERITAGE MANAGEMENT

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- Good presentation of objects/places means their intrinsic cultural values are interpreted in such a way that all kinds of visitors can understand them.
- However, two critical caveats must be appreciated.
- First, making things accessible does not necessarily mean free and open access to all. Access must be managed carefully to ensure that the tangible values of the asset are not damaged or the intangible values compromised.
- Second, a balance between education and entertainment must be achieved. Museums, for example, are predicated on mainly educational objectives, while some heritage theme parks that also see themselves as having a conservation role may focus more on entertainment.

# HERITAGE VARIES IN SCALE, COMPLEXITY, AND MANAGEMENT CHALLENGES

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- However, intangible heritage, cultural landscapes, and traditions that embody such things as folklore, storytelling, practices associated with worship, festivals, and other cultural expressions are an equally important element.
- Different types of cultural tourists want to experience different types of heritage.
- The casual and incidental cultural tourist and, to a lesser extent, the sightseeing cultural tourist are most interested in consuming tangible heritage experiences.
- The purposeful and serendipitous cultural tourist, and sometimes the sightseeing cultural tourist, are looking for a more back of house experience and value intangible heritage the most.

# HERITAGE VARIES IN SCALE, COMPLEXITY, AND MANAGEMENT CHALLENGES

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- Assets can vary in scale and complexity, creating their own unique management challenges.
- For example, tangible heritage can be as small as a snuffbox collection or near global in scale, as in the case of the Trans-Atlantic Slave Route or the built heritage that comprises the Silk Road.
- Likewise intangible assets can be as complex as the folklore of 20 ethnic groups in a region or as small as a favourite story told by a storyteller.
- Importantly as well, the tangible and intangible are intrinsically linked, for the intangible often gives meaning to the tangible, and the tangible often embodies intangible practices.

# HERITAGE VARIES IN SCALE, COMPLEXITY, AND MANAGEMENT CHALLENGES

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- The conferring of heritage designation represents a form of contemporary recognition of the intrinsic values of these assets and also implies an obligation to manage them for future generations. In some cases, the task is relatively easy, as in the case of museum displays of small items.
- In other cases, though, the task is incredibly complex, infused with domestic politics and transnational legislation.
- Whether minority or indigenous cultural heritage is deemed worthy of conserving is an innately political process, while how best to preserve it may lead to conflict between stakeholders.
- Ideally, tradition bearers should collaborate with archivists, academics, or musicologists to contextualize cultural objects in their care or when documenting 'living' heritage.

# CULTURAL HERITAGE MANAGEMENT: AN EVOLVING FRAMEWORK INFLUENCED BY LOCAL CONDITIONS

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- The practice of CHM is still a relatively new phenomenon – its rules, guidelines and protocols are still evolving.
- It has been observed that jurisdictions tend to follow a five phase development comprising; inventory, development of initial legislation, increased professionalism, emergence of stakeholder consultation and review and integration of prior practices before maturity is established.
- This is basically a process where public sector agencies gradually implement more principles and practices to enhance CHM in any particular jurisdiction. It coincides often with the community's desire to conserve heritage, followed by a deeper involvement in decision-making and management.

# CULTURAL HERITAGE MANAGEMENT: AN EVOLVING FRAMEWORK INFLUENCED BY LOCAL CONDITIONS

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| <i>Phase</i>              | <i>Key features</i>   |
|---------------------------|---|
| Inventory                 | <ul style="list-style-type: none"><li>• Growing community interest</li><li>• Documentation</li><li>• Evolution from amateurs to professionals conducting work</li></ul>   |
| Initial legislation       | <ul style="list-style-type: none"><li>• First generation legislation to guide identification and protection of heritage assets</li><li>• Focus on tangible not intangible heritage</li><li>• Creation of government heritage agencies</li><li>• Little integration with other government agencies or laws</li></ul>     |
| Increased professionalism | <ul style="list-style-type: none"><li>• Formation of heritage IGOs and NGOs</li><li>• Formalization of codes of ethics, conservation principles in charters, etc.</li><li>• Development of related heritage professions (public and private)</li></ul>  |
| Stakeholder consultation  | <ul style="list-style-type: none"><li>• Emergence of wide array of stakeholders</li><li>• Areas of conflict identified</li><li>• More attention paid to community interests</li></ul>   |
| Review                    | <ul style="list-style-type: none"><li>• New understanding of responsibilities</li><li>• New or revised legislation</li><li>• More integrated planning and practice</li><li>• Greater awareness of intangible heritage</li><li>• Recognition of other users</li><li>• New paradigm in place</li><li>• Maturity</li></ul> |

Source: Hilary & McKercher (2014)

# CULTURAL HERITAGE MANAGEMENT: AN EVOLVING FRAMEWORK INFLUENCED BY LOCAL CONDITIONS

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- Jurisdictions first become involved in this activity when academics, community leaders, and politicians begin to recognize the intrinsic value of heritage and see the need to conserve it.
- This stage often occurs reactively, out of the awareness that important heritage values are being lost.
- The first step, then, involves nascent attempts to document assets and is often driven by keen amateurs or a small group of heritage professionals.
- Although inventorying of heritage places and cataloguing of objects are important, overemphasis on these actions can mean that longterm conservation objectives are not addressed.
- Problems can also occur in a heritage planning process when conflicts over use of a cultural asset by different user groups are not anticipated or avoided.
- CHM must become a process that is both professional and systematic to deal with a diverse range of concerns.

# CULTURAL HERITAGE MANAGEMENT: AN EVOLVING FRAMEWORK INFLUENCED BY LOCAL CONDITIONS

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- The subsequent phase so represents the sector's enhanced professionalism and the local political system's increased acceptance of this.
- The adoption of formal standards of conduct and conservation charters occurs, with nations often signing international charters.
- A more professional approach to asset identification, value estimation, and long-term management results from formalizing the management process as opposed to merely passing legislation to safeguard real assets.
- At this point, a diverse range of heritage specialists from the public and commercial sectors—from architects to consultant archaeologists—join the market.
- Similar to this, institutions frequently start offering specialized degree programs with a heritage focus at this point.

# CULTURAL HERITAGE MANAGEMENT: AN EVOLVING FRAMEWORK INFLUENCED BY LOCAL CONDITIONS

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- The fourth and fifth stages reflect even greater sophistication of the field. In the fourth stage, instead of being imposed by outsiders, an increased awareness of the involvement of key stakeholders as interested parties and managers or co-managers of assets begins to emerge.
- More attention is paid to community concerns.
- Existing legislation has to be modified and a more integrative approach to management needs to be adopted.
- The fifth and last step recognizes the dynamic nature of heritage management where current practice is reviewed and revised as necessary to ensure that a broader societal good is served.
- Therefore, the development of particular CHM practices follows the broader societal and political evolution of cultural values and management strategies.
- As a result, it is incredibly difficult to properly implement the latter two evolutionary stages in jurisdictions that have only just come to understand the need of preserving their cultural heritage and where CHM has little connections to other stakeholders.

# CULTURAL HERITAGE MANAGEMENT: AN EVOLVING FRAMEWORK INFLUENCED BY LOCAL CONDITIONS

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- A series of international codes, conventions and charters has been developed by a variety of agencies to ensure jurisdictions adhere to similar principles for the identification and management of heritage. These codes define core heritage philosophy and in doing so influence legislation and subsequent management protocols. Some of the agencies involved in heritage management include:
  - UNESCO: United Nations Educational, Scientific and Cultural Organization (which began the international focus on heritage with the Convention on the Protection of Cultural Property in the Event of Armed Conflict, 1954);
  - ICOMOS: International Council on Monuments and Sites (an international professional organization of heritage professionals concerned mainly with the conservation of tangible heritage assets);
  - IUCN: International Union for the Conservation of Cultural and Natural Resources (also known as the World Conservation Union);
  - IATF: Inter-Agency Task Force (for improving risk-preparedness for World Heritage places – a more recent development);
  - ICCROM: International Centre for the Study of the Preservation and Restoration of Cultural Property (established in Italy by UNESCO in the early 1960s);
  - ICOM: International Council of Museums (an international professional organization of heritage professionals concerned mainly with museums).

# CULTURAL HERITAGE MANAGEMENT: AN EVOLVING FRAMEWORK INFLUENCED BY LOCAL CONDITIONS

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- The use of, or adherence to, international standards and principles is increasing. One example of such a set of standards is The Venice Charter (ICOMOS 1976, 1994) devised during the Second Congress of the Architects and Technicians of Historic Monuments in Venice in 1964 and adopted when the International Council on Monuments and Sites formed in 1965.
- Over the years, it hasn't undergone many changes, though two new principles were introduced in 2003.
- The Venice Charter's defining characteristics define best practices as they were at the time for the preservation and restoration of monuments and sites, especially in relation to: historic buildings (now extended to groups of buildings); conservation (restrictions on modification); restoration with authenticity in mind (no reconstruction); professionalized archaeological investigation; and documentation (any action should be documented systematically and a public record kept).

# CULTURAL HERITAGE MANAGEMENT: AN EVOLVING FRAMEWORK INFLUENCED BY LOCAL CONDITIONS

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- Other international organizations besides ICOMOS have charters that form the basis of constitutions (e.g. ICOM's Code of Ethics was adopted in 1986; ICOM 2014a). The influence these articles have at the local level can guide the professionalism phase in the development of CHM in each member State (Party) chapter of these international organizations. How well they use these charters and codes in debates over the direction of heritage management and tourism development also varies.
- What makes a difference in every jurisdiction is how much general support these codes and charters have from the public sector agencies and how much these documents provide support for the views of professional heritage managers.
- The phase of increased stakeholder consultation is extremely important in the development of every CHM tradition, because this is where heritage professionals first have their views challenged by the community and learn how to share power (if they have any) with them over the cultural assets being managed.

# STAKEHOLDERS

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- Defining who stakeholders are and what they expect is important for setting conservation management priorities in mature traditions of CHM.
- Here, understanding cultural significance and how it relates to the socially constructed meanings of the physical lies at the heart of stakeholder consultation.
- External stakeholders may, in fact, have more power over how the asset is managed and presented to the public than the owners/managers of the asset.
- The wishes of such international stakeholders as UNESCO or ICOMOS must be addressed in order to secure heritage standing for some places. Alternatively, the tourism sector can be a powerful stakeholder, especially when supported by government which can push for management actions that benefit the sector to the detriment of the asset.

# STAKEHOLDERS

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- Ostensibly stakeholder consultation seems a rather straightforward process. In reality, most assets have multiple stakeholders with differing degrees of connectivity to the asset, differing levels of legitimacy, and widely differing viewpoints about how assets should be managed.
- Consequently, the process of consulting stakeholders is one of most political areas of CHM practice and one that puts heritage managers themselves and their decisions under the most scrutiny.
- CHM in fully democratic societies is usually subject to open media coverage where in very strident public debates it has been observed that without expert opinion it is “just a bullring”.
- Furthermore, the term ‘consultation’ means different things in different societies. In some cases, the process is so consensual that it feels like a never-ending process which results in lengthy delays.
- In other cases, it is little more than window dressing, where consultation consists of holding one large public meeting and informing people what will be done (not that that is an approach to be recommended).

# STAKEHOLDERS

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- Landorf (2009) examined the relationship between heritage tourism and sustainable development at six British sites.
- Her study concluded that while all management plans identified major stakeholders, only two defined their relationships in detail.
- She noted that the depth of consultation and the extent to which it influenced the final strategic direction was not particularly evident, leading her to conclude that WHS managers are not actively planning and managing the economic and social sustainability dimensions in the same way they are managing the environmental sustainability dimension.

# MANAGEMENT CHALLENGES

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- The management of cultural heritage assets can be complicated by a number of exogenous factors.
- To begin, it is much easier to achieve consensus when there is a single overriding agency responsible for the entire site, but becomes increasingly difficult where there are multiple agencies or where no single formal agency exists.
- Land tenure arrangements also complicate the management challenge.
- The Hadrian's Wall WHS in the UK is, perhaps, an exceptional case. Here, the majority of the site is in private ownership, as is most of the buffer zone around it. According to its most recent management plan (UNESCO 2007), a considerable number of bodies own and manage approximately 10 percent of the site specifically for conservation and access, while the rest consists of medium to large estates, owner occupied farms, and residential and commercial lots in urban areas.
- A number of trusts have some involvement in the site, along with eight local authorities, English Heritage, and other groups.
- Tourism and economic development roles, plus a large number of central government agencies and departments all share some responsibility for site management, creating a significant management challenge to address the needs of multiple stakeholders with differing levels of influence and often holding competing views.

# MANAGEMENT CHALLENGES

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- The layer of government that is facilitating a study or planning exercise and where it sits in a bureaucracy can influence the way use decisions for cultural assets are made, especially in developing economies.
- Countries where central governments take the lead in CHM can impose an overall consistent management strategy and objectives. In places like China, however, management of WHS is devolved to local government officials who mostly have no background in heritage management but who often have aspirations to be promoted.
- Cai (2004 as cited in Li et al. 2008) noted that promotion is often based on reaching economic goals rather than the effectiveness of achievements.
- As such, few officials make a longterm commitment to the area under their jurisdiction and, instead, are more likely to support opportunistic initiatives that provide the greatest short-term reward. Li et al. (2008) note that policies in the tourist development master plans and WHS are likely to favour exploitation rather than conservation.

# MANAGEMENT CHALLENGES

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- Revenue generation and allocation are issues that receive less attention.
- Heritage assets rarely receive much of the revenue generated from tourism. If the asset is run by government agencies, income goes into 'consolidated revenues' in much the same way as income or sales tax.
- It is then redistributed at the government's will for whatever purposes it sees fit. Income from tourism sites is seen as a profit generator, where the income generated exceeds the expenses incurred.
- If it is a public asset that is managed by a private firm under a management contract, then the firm normally agrees to pay a flat fee or a percentage of sales back to the lead agency and retain excess income.
- In some cases, sites are licenced to private firms, as happens in some developing economies.

# WORLD HERITAGE

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- World Heritage represents a unique form of cultural heritage. WHS are recognized as having outstanding universal value to humanity.
- Designation is prized, for it represents an 'International Top Tourism Brand' that places destinations among the pantheon of other world-class destinations.
- It is for this reason that designation can act as a focal point for national marketing campaigns (Li et al. 2008).
- While tourism is often the motive behind the pursuit of World Heritage status, tourism potential is not one of the criteria used to identify prospective sites.
- This duality creates a range of challenges.

# UNESCO WORLD HERITAGE CONVENTION

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- The ‘Convention Concerning the Protection of the World’s Cultural and Cultural Heritage,’ more commonly referred to as the ‘World Heritage Convention’ was approved by UNESCO in 1972 and adopted formally in 1976.
- The objectives of the Convention are to encourage the identification, protection and preservation of cultural heritage properties which “because of their exceptional qualities, can be considered to be of ‘Outstanding Universal Value’ and as such worthy of special protection against the dangers which increasingly threaten them” (UNESCO WHC 2013: 2).
- It achieves this goal by encouraging countries to sign the Convention, nominate sites for inclusion, establish management plans and set up reporting systems for sites, assist countries to safeguard WHSs by providing technical assistance and professional training, provide emergency assistance for WHSs in immediate danger, support public awareness-building activities, encourage participation of the local population in the preservation of their cultural and natural heritage, and promote international cooperation in the conservation of our world’s cultural and natural heritage (UNESCO 2008).
- Over the years, the Convention has stayed close to its original promise, although it has been modified from time to time. For example, new heritage categories such as cultural landscapes have been added, revisions have been made to national and international guidelines, changes to the implementation guidelines were introduced, and more emphasis was placed on partnerships with a broader range of stakeholders.

# THE NOMINATION PROCESS

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- The World Heritage Committee (WHC) is the body in charge of the implementation of the Convention. Candidate places must satisfy at least one of ten criteria to be considered for inclusion on the list. Six apply specifically to cultural sites, as follows:
  - (i) Represent a masterpiece of human creative genius;
  - (ii) Exhibit an important interchange of human values, over a span of time or within a cultural area of the world, on developments in architecture or technology, monumental arts, town planning or landscape design;
  - (iii) Bear a unique or at least exceptional testimony to a cultural tradition or to a civilization, which is living or which has disappeared;
  - (iv) Be an outstanding example of a type of building, architectural or technological ensemble or landscape, which illustrates (a) significant stage(s) in human history;
  - (v) Be an outstanding example of a traditional human settlement, land-use, or seause, which is representative of a culture (or cultures), or human interaction with the environment especially when it has become vulnerable under the impact of irreversible change;
  - (vi) Be directly or tangibly associated with events or living traditions, with ideas, or with beliefs, with artistic and literary works of outstanding universal significance. (The Committee considers that this criterion should preferably be used in conjunction with other criteria.)

# THE NOMINATION PROCESS

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- Only signatory governments can nominate places, with the nomination process following a clearly defined process (UNESCO 2008;DEA 2014).
- Initially states make an inventory of important natural and cultural heritage sites (the 'Tentative List'), and then they identify specific sites for consideration ('Nomination File').
- Nominated properties are then evaluated independently by two non-governmental organizations (NGOs) to ensure they meet the criteria.
- In the case of cultural properties, ICOMOS and ICCROM evaluate applications and make recommendations with some input from IUCN if properties have mixed cultural and natural values.
- The WHC meets once a year after this step has been taken to make the final decision on inscription.

# THE NOMINATION PROCESS

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- The process does not end there, though, for two other factors must also be considered before sites can be inscribed on the World Heritage List.
- An additional criterion was introduced in 1994 with the introduction of the 'Global Strategy for a Representative, Balanced and Credible World Heritage List' (UNESCO WHC 2014a) to try to get a better balance of sites and locations.
- Concern grew during the late 1980s and early 1990s that the geographic representation of the List was skewed in favour of European sites, while those from the Asia-Pacific and African economies were under-represented. Likewise, it was observed that historic towns and religious monuments, Christianity, historical periods and 'elitist' architecture (in relation to vernacular) were all over-represented, while other cultural sites and natural heritage sites were under-represented (UNESCO 2008). The causes of this imbalance are either structural (nomination process, managing and protecting cultural properties) or qualitative (how properties are identified, assessed, and evaluated) in nature.

# THE NOMINATION PROCESS

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- The second factor relates to the introduction of the 'World Heritage Sustainable Tourism Programme' in 2001.
- The need for this programme grew out of the dual recognition that:
  - 1) inscription could lead to greater visitation of sites which, therefore, demanded stronger management activities; and,
  - 2) the potential for tourism development opportunities may lead some State Parties to misuse the World Heritage brand and trivialize the concept of Outstanding Universal Values for tourism.

# THE NOMINATION PROCESS

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- The World Heritage Sustainable Tourism Programme has undergone a number of iterations since it was first launched, with the latest version requiring parties to conduct what is in effect an environmental impact study with the aim of integrating sustainable tourism principles into the mechanisms of the World Heritage Convention. The current programme's objectives are to:
  - Integrate sustainable tourism principles into the mechanisms of the World Heritage Convention;
  - Strengthen the enabling environment by advocating policies, strategies, frameworks and tools that support sustainable tourism as an important vehicle for protecting and managing cultural and natural heritage of Outstanding Universal Value;
  - Promote broad stakeholder engagement in the planning, development and management of sustainable tourism that follows a destination approach to heritage conservation and focuses on empowering local communities;
  - Provide World Heritage stakeholders with the capacity and the tools to manage tourism efficiently, responsibly and sustainably based on the local context and needs;
  - Promote quality tourism products and services that encourage responsible behaviour among all stakeholders and foster understanding and appreciation of the concept of Outstanding Universal Value and protection of World Heritage.

# TANGIBLE CULTURAL HERITAGE

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- All assets that embody cultural values physically fall under the category of tangible cultural property, including museums, historic sites, buildings, archaeological dig sites, and cultural landscapes (UNESCO WHC et al. 2013; ICOM 2014b).
- Due to the ease with which their integrity and condition can be evaluated, these assets are regarded to be simpler to manage than intangible heritage assets.
- However, a variety of processes continue to exist that have the potential to harm or even eliminate tangible cultural heritage, with tourism being one such stressor agent.

# CONVENTIONS, CODES, CHARTERS, AND DECLARATIONS

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- The tangible heritage evaluation and conservation processes are usually guided by a series of international protocols housed in codes, charters, or guidelines.
- Many of these codes build on the ICOMOS The Venice Charter (1994) or its regional variations such as The Burra Charter (ICOMOS 2014), while the museum community has developed its own set of the codes for managing collections and exhibitions (ICOM 2014b).
- Since these articles are revised or amended frequently, the reader is advised to consult the relevant websites for the most up-to-date information.
- Certain documents listed here will be of key interest to tourism professionals (e.g. UNESCO's World Heritage Convention, the ICOMOS Cultural Tourism Charter and the ICOMOS Ename Charter), while the others are provided for a general understanding of how protection and professional practice is guided from the regional and international level for specific categories of tangible heritage.

# A FOUR STAGE PLANNING PROCESS

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- Heritage planning generally follows a four stage process of:
  - 1 identification, classification and documentation of the heritage asset and its components;
  - 2 assessment of the cultural values evoked by the physicality of the asset;
  - 3 analysis of the opportunities and constraints which will have a bearing on the production of a conservation and management policy;
  - 4 the implementation of decisions and recommendations, including that of ongoing monitoring or detailed recording prior to removal or conservation work.
  - (based on Pearson and Sullivan 1995: 8–9; ICCROM 2014)

# A FOUR STAGE PLANNING PROCESS

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- Documentation is critical.
- Finding out as much as possible in advance in a systematic way about the asset and its setting, as well as making sure that this information is available to all parties that are involved in the process will help identify intrinsic and extrinsic values associated with assets.
- Individuals carrying out documentation and research should disclose why the information is needed and include these stakeholders, if interested, in further consultation.
- In addition, identification of the state of the existing fabric of a tangible heritage asset has been a long-standing part of any conservation planning process, so facilitators of a project should expect that this stage may take some time commensurate with the scale of the asset.

# IDENTIFICATION: DIFFERING CATEGORIES OF TANGIBLE HERITAGE

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- Essentially, tangible heritage can be grouped into three broad categories: buildings and archaeological sites; heritage cities, cultural routes and cultural landscapes; and movable cultural property and museum collections.
- **Buildings and archaeological sites**
  - Buildings and archaeological sites are the most common types of tangible heritage documented.
  - The initial motivation to document them is often to fight to save these structure and sites from destruction, while in the latter stages, the focus tends to shift to finding suitable uses for the conserved assets. Even when tourism is not cited as a conservation rationale, developing appropriate visitor programmes should be an integral part of conservation planning (Pearson and Sullivan 1995, Shackley 1998).
  - Archaeological sites have special issues for site interpreters and with this in mind the Ename Centre for Public Archaeological and Heritage Presentation worked closely with the ICOMOS International Scientific Committee on Interpretation and Presentation of Cultural Heritage Sites to produce the Charter on the Interpretation and Presentation of Cultural Heritage Sites 2008; 2014)

# HERITAGE CITIES, CULTURAL ROUTES AND CULTURAL LANDSCAPES

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- Cultural heritage assets can cover entire neighbourhoods, historic cities, routes and broader cultural landscapes.
- After the initial concentration on individual items, heritage management started to consider more closely how to conserve items in groups at a more collective level.
- Typically, historic cities and towns are managed through town planning guidelines, by-laws, zoning structures and policies that often include special regulations for heritage precincts or conservation areas.

# HERITAGE CITIES, CULTURAL ROUTES AND CULTURAL LANDSCAPES

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- The identification of special precincts and the subsequent development of a precinct wide management plan has proven to be quite successful, providing they are discrete areas with clearly defined boundaries and also providing property developers buy into the concept of conserving cultural values.
- In many cases, however, valuable cultural assets often lie outside specially designated areas.
- Here, the HUL Approach supported by the UNESCO recommendation represents a major step forward for the care of these kinds of assets. It has as its basis a greater awareness of the “challenges facing urban heritage in the new century” (Bandarin and van Oers 2012: 65).

# HERITAGE CITIES, CULTURAL ROUTES AND CULTURAL LANDSCAPES

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- The HUL Approach is essentially an elaborate toolkit for citywide conservation which also allows for new resources to be added.
- The approach tries to link issues concerned with sustainability, resilience, adaptation to climate change, and globalization to those of standard urban heritage planning and conservation.
- Creative industries and tourism are also given a higher status than previously in trying to reach a balance that will satisfy a wide array of stakeholders.
- The toolkit comprises four areas that need to be addressed simultaneously, due to their interdependence:

# FOUR AREAS OF THE TOOLKIT

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- **Regulatory systems** comprising statutory frameworks, policies and traditional caretaker practices where these exist.
- **Community engagement tools** to identify key values in their urban areas. For example, cultural mapping exercises which rely on feedback from community focus groups about their histories and traditions. More than that, such tools should also facilitate intercultural dialogue by listening to the needs and aspirations of communities and be able to mediate between conflicting interests and groups.
- **Technical tools** to protect the integrity and authenticity of the architectural, visual, spatial, and material attributes of urban heritage. For example, studies that acknowledge cultural significance and diversity, and provide measures for monitoring/management of change to improve the quality of life of the community. Also, inventories of natural and cultural features should be undertaken or updated regularly. Cultural heritage and social impacts should be considered a higher priority in development planning that requires environmental impact assessments (EIAs) with the results integrated regularly into urban planning and design.
- **Financial tools** (mechanisms, incentives, policies and so on) should aim to improve urban areas while safeguarding their tangible and intangible values. Flexible mechanisms are recommended such as micro-credit financing and public–private partnerships facilitated by public sector or not-for-profit organizations.

# HERITAGE CITIES, CULTURAL ROUTES AND CULTURAL LANDSCAPES

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- Overall, the definition of a HUL is one where “the urban settlement is understood as a historic layering of cultural and natural values, extending beyond the notion of ‘historic centre’ or ‘ensemble’ to include the broader urban context and its geographical setting” (Bandarin and van Oers 2012: 200).
- Accordingly, this approach recognizes that this category of heritage asset needs not just a few but all of the above tools for an integrated approach to planning and management to be holistic, inclusive, and participatory.
- Even before HUL started to gain popularity, other approaches to linking tangible and intangible heritage in historic cities were being tried to mitigate the pressure of globalization.
- These measures also try to work to provide a better experience of unique local culture and sense of place for tourists, while mitigating the impacts of tourism in return.
- Over the last ten years or so, various international bodies have showcased the best examples of integrated urban planning and heritage management these to use as exemplars to other places facing similar problems.

# HERITAGE CITIES, CULTURAL ROUTES AND CULTURAL LANDSCAPES

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- Due to the desire in traveling in the footsteps of past pilgrims or travelers, cultural routes in particular have the potential to be a particularly marketable sort of asset for tourism.
- They are so well-liked, in fact, that rural communities and tourism marketing agencies are collaborating closely to build man-made networks between historic sites to promote visitor use, some with assistance from outside money.
- Examples include the Silk Road and the Tea and Horse Trade Route, site conservation projects for which have received resources from overseas partners and international organizations to commodify them for tourism and build management capacity.

# HERITAGE CITIES, CULTURAL ROUTES AND CULTURAL LANDSCAPES

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- **Cultural landscapes** are another heritage category.
- They comprise a cultural asset where natural and cultural values are highly integrated and one that embodies how humans influence change in the environment over time by undertaking particular activities.
- The term also recognizes that tangible and intangible heritage should be protected together, as has been long acknowledged by certain indigenous societies.
- So it is no surprise that UNESCO included cultural landscapes as a way to broaden the World Heritage List and included them in the operational guidelines when updating the World Heritage Convention.
- As a consequence of these shifts in focus, a more holistic approach is needed to identify and manage a heritage asset that comprises a broad array of values and elements. It should be seen as a sum of the whole rather than focusing on individual parts (Bandarin and van Oers 2012).

# MOVABLE CULTURAL PROPERTY, COLLECTIONS AND MUSEUMS

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- Movable cultural property includes any type of portable heritage object, artwork or artifacts, such as ancient scrolls, wine bottles from shipwrecks, painted African masks, Hindu sculptures of a deity, or Babylonian pottery sherds. It is an extremely vulnerable type of asset as it can be damaged, sold on the black market, or its intangible values destroyed when it is removed from its original context.
- Movable archaeological cultural property is also extremely vulnerable to souveniring practices by visitors.
- Even something as small as a pretty blue bead or broken piece of pottery is easy to pick up and walk away with, which reduces the authenticity of the experience for others and the site's value scientifically.

# MOVABLE CULTURAL PROPERTY, COLLECTIONS AND MUSEUMS

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- Management priorities for movable cultural property that has been removed from or has lost its original home differ from those for other heritage assets, because such assets need to be placed in a suitable setting such as a museum, gallery or library (and hopefully can be displayed rather than just stored).
- When it is an artifact or object that has lost some sense of where it has come from, it cannot be used in displays or research unless a specialist can identify or authenticate it.
- This is also why documentation is important for verifying artworks and as part of excavation or archaeological rescue work, as there are so many objects that have been removed illegally and have lost all clues to their exact origin and there are not the resources to relocate and recontextualize them all.
- Although the international conventions and documents on movable property have raised the awareness of this problem, there is still a way to go in order to ensure that not only tourists, but art collectors and museums, do not get talked into acquiring illegally sourced objects and artwork.

# MOVABLE CULTURAL PROPERTY, COLLECTIONS AND MUSEUMS

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- Occasionally, items may be kept in their original location, such as farming equipment in a historic barn. However, they have typically been taken out of their environment.
- Many things undergo commercialization in order to be displayed by being "conserved" (work done by a qualified materials conservator to repair or stabilize their physical condition), displayed, and explained.
- Many museums place a high priority on appropriate display of their collections to engage visitors in new ways to absorb educational messages about their cultural values. The increasingly constructivist approaches of these institutions allows more room for visitors to experience the collection informally and in their own way.
- That is, visitors are given opportunities and resources to 'construct' their own meanings (in terms of their own frame of reference) for such objects as a way of learning about them.

# ASSESSING CULTURAL SIGNIFICANCE: THE INTRINSIC VALUES OF TANGIBLE HERITAGE

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- While precise definitions of cultural significance are place-specific to reflect local conservation priorities, at their core they espouse a similar philosophy.
- The concept of assessing cultural significance has been important to heritage management from the beginning, yet it is only relatively recently that more professionals have accepted that the role of value in decision-making should be made explicit (Clark 2009).
- The Australia ICOMOS Burra Charter was the first set of conservation principles to make this link. It has been influential in the region (du Cros and Lee 2007). Hence, it is described as ICOMOS's first regional charter of conservation principles.
- The Burra Charter (of 1979 – revised 1983, 1988, 1999 and 2013) defines cultural significance as meaning the “aesthetic, historic, scientific, social or spiritual value for past, present or future generations”.

# AUTHENTICITY

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- Perhaps the only topic in CHM and conservation planning where there has been spirited discussion and a discernible shift in viewpoints is authenticity.
- Within and outside of CHM circles, usage of the terms "authenticity" and "authentic" has altered significantly over the past 200 years (Larsen 1994; Lowenthal 1994). Consequently, the idea of "authenticity" needs to remain a moving target (Jokilehto 1994; Lowenthal 1994).
- The word has etymological roots in Classical Greco-Roman literature and was originally used to denote a sense of an authentic, sincere, or unique aspect in a historical context.

# MANAGEMENT: VISITOR ACCESSIBILITY AND USE

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- Not all assets should be made accessible to all visitors. Instead, the level of access and types of approved activities need to be defined by the robustness of the asset and its traditional uses.
- Setting use management priorities lies somewhere along a use/conservation continuum shown in Figure 5.1. For instance, heritage places guided by a conservation only ethos will need to adopt measures to reduce visitation and minimize or mitigate impacts.
- Alternatively, places with high use potential can be managed in such a way as to encourage visitation.
- Usually a balance of use and conservation considerations will drive management decisions (du Cros 2000).

# INTANGIBLE CULTURAL HERITAGE AND CREATIVE ARTS

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- If tangible heritage represents a community's hardware, ICH represents its software.
- The definitions used in the UNESCO:
  - *Convention for the Safeguarding of the Intangible Cultural Heritage, 2003 state that ICH means the practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artifacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. This intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment, their interaction with nature and their history, and provides them with a sense of identity and continuity, thus promoting respect for cultural diversity and human creativity.*
    - (UNESCO 2014)

# CONVENTIONS, CODES, CHARTERS, AND DECLARATIONS

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- As with tangible cultural heritage, a variety of international codes, charters, and conventions have been developed to help identify and manage ICH.
- But, unlike tangible cultural heritage where the mandate is to conserve, here, the mandate changes to 'safeguarding' intangible heritage, in recognition of its dynamic nature.
- Conservation may lead to fossilization and museumification of traditions, while safeguarding seeks to keep them alive and vibrant.
- Consequently, a different set of issues is raised. Intangible heritage is by definition people-orientated rather than object-centred. At its core, implementation of the UNESCO
- Convention could transform the relationships between museums and their audiences and stakeholders (Boylan 2006). Knowledge transfer and education programmes that use tradition bearers, living treasures, artists, and performers play an important role in promoting the continuity of ICH.

# A THREE STAGE APPROACH TO SAFEGUARDING INTANGIBLE CULTURAL HERITAGE

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- Museums, cultural community centres and institutes, among others from the public and not-for-profit sectors, have been involved at the local level in the increasingly systematic approach to safeguarding ICH.
- Although the development of widely adopted management approaches is still in its early stages, overall it appears that most countries seem to have adopted a three stage approach, comprising:
  - 1 involvement of communities;
  - 2 documentation and developing an inventory;
  - 3 building capacity within communities to continue transmission of ICH.
- Museums have an important role to play in intangible heritage management and knowledge transfer through investigation, documentation, and assisting communities to build capacity in the transmission of these techniques and skills (Boylan 2006).

# KEY PRODUCERS, PERFORMERS AND BEARERS OF INTANGIBLE CULTURAL HERITAGE

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- Part of the difference between tangible and intangible heritage is that the latter requires the presence of people to give it life.
- Consequently the cooperation and participation of 'folk', 'tradition bearers', 'living treasures', 'sifus or masters/mistresses' and others is essential, otherwise, it becomes little more than shallow performance.
- Likewise, the setting is important, for intangible heritage is intrinsically linked to place. From a tourism perspective, as well, seeing an 'authentic' individual demonstrating ICH in a 'real' place enhances the experience.
- Performers and artisans using traditional methods or modes of cultural expression play a key role in the maintenance of traditions and the presentation of these traditions to tourists.
- Consequently, tradition bearers, custodians, and religious figures with special knowledge are becoming involved in the delivery of tourism products.
- They may be secular, sacred, or a mixture of both. These individuals see themselves primarily as custodians of knowledge, and their role as presentors of knowledge for tourists as secondary.

# CATEGORIES OF INTANGIBLE CULTURAL HERITAGE AND THEIR COMMODIFICATION FOR TOURISM

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- Sometimes it is not clear what and how to commodify ICH for tourism in a sustainable way.
- This issue is not covered well in any of the charters or codes listed, which are more about recognizing and safeguarding it in the face of cultural change and globalization.
- The closest any of them come to explicitly dealing with the issue is the most recent – the UNWTO Ninh Binh Declaration on Spiritual Tourism for Sustainable Development.
- Using the UNESCO Convention as a basis to explore this issue further in relation to ICH as a whole, five main domains of intangible heritage that also have potential for tourism commodification are:
  - 1 traditional craftsmanship;
  - 2 social practices, rituals and festive events;
  - 3 performing arts;
  - 4 oral traditions and expressions, including language as a vehicle of the ICH;
  - 5 knowledge and practices concerning nature and the universe.

# TRADITIONAL CRAFTSMANSHIP

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- Handicrafts have been the mainstay of the material culture offered to tourists as souvenirs.
- Like any product, purchasing handicrafts satisfies a range of personal needs, wants and desires.
- They include household products, traditional beauty products, cosmetics and medicines, clothing, art, paintings, sculptures, pottery, traditional ceremonial artifacts, and even industrial goods including farm implements, tools, and industrial artifacts (Marwick 2001).
- Unlike other types of souvenirs, handicrafts play a much more personal role in shaping the tourist experience (Marwick 2001), fostering long-term memories and associations with a place.
- As such, they are valued more highly than most other souvenirs.
- They are one of the few items that reflect authentic local culture in a globalized world.
- It is becoming increasingly hard to find things that are truly unique and authentic.
- Yet, tourists are looking for original, authentic items and want to buy them at their place of origin (Ventacachellum 2004). Handicrafts have a deep association with a place, its people, their ways of life and/or a certain period of time.

# SOCIAL PRACTICES, RITUALS, AND FESTIVE EVENTS

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- Social practices, rituals, and festive events are defined by UNESCO (2014) as “habitual activities that structure the lives of communities and groups and that are shared by and relevant to many of their members”.
- Many ethnographic, social history, and local history museums and NGOs have been engaged in the documentation and promotion of such practices, in part because they are so vulnerable to changes brought about by globalization.
- These types of activities are significant because they help affirm individual, group, or society identity and, more importantly, are related to important events.
- Harvest festivals, birth rituals, religious celebrations, and a wide range of other activities fall into this class.
- Scale can vary from small family rituals to community or nationwide celebrations.

# PERFORMING ARTS AND PERFORMANCE

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- Performing arts, including traditional and contemporary music, dance, and theatre, represent a third category of ICH (UNESCO 2014) that is frequently the subject of tourism commodification because of its often vibrant and dynamic nature.
- The cultural assets can vary in size from full theatre productions and symphony orchestra performances to a single storyteller or street performer.
- The geographic scale can be as large as a theatre district in cities like London or New York, or as small as a street corner.
- Likewise, venues may be purpose-built or spontaneously created. The artificial distinction between high and low culture in performing arts, no longer applies, as so-called low culture is often a reflection of the cultural behaviour of the masses.
- Indeed, Xie et al. (2007) discuss the emergence of 'hip hop' tourism as a form of intangible cultural tourism and the potential to commodify it for large-scale touristic consumption.

# ORAL TRADITIONS AND EXPRESSIONS, INCLUDING LANGUAGE AS A VEHICLE OF THE INTANGIBLE CULTURAL HERITAGE

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- Oral traditions encompass a wide variety of spoken activities that can include proverbs, riddles, tales, nursery rhymes, legends, myths, epic songs and poems, charms, prayers, chants, songs, dramatic performances, and more (UNESCO 2014).
- Historically, they were used to pass knowledge, social values, and collective memories across generations. As such, they are felt to play a key role in keeping cultures alive.
- However, UNESCO (2014) points out that like other forms of ICH, oral traditions are threatened by globalization, urbanization, migration, industrialization and, in particular, the spread of mass media that tends to present a homogeneous westernized view of the world.
- Tourism can be both a saviour and threat to oral traditions. On the one hand, storytelling cultural exchange with tourists is beneficial, especially if it helps them understand indigenous cultural practices. It can also provide employment for traditional storytellers, and in doing so, keep these traditions alive. However, tourists want products and experiences that are easy to consume, and given their limited time budgets, quick to consume.

# KNOWLEDGE AND PRACTICES CONCERNING NATURE AND THE UNIVERSE

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- This category includes knowledge, knowhow, skills, practices, and representations developed by communities by interacting with the natural environment (UNESCO 2014).
- This domain emerged out of the recognition that different communities think about the universe in different ways and have developed a series of oral traditions, place attachments, and memories of place that reflect that memory.
- How different groups think about nature and the universe also underlies many social practices and cultural traditions.
- Traditionally, life for most agricultural and nomadic communities was driven by the seasons.
- Food was also seasonal, with different foods in abundance or shortage at different times of the year.

# TOURISM, AUTHENTICITY, AND INTANGIBLE CULTURAL HERITAGE

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- The greatest challenge facing the tourist provision of ICH is how to convert something that is essentially private and personal into something to be consumed by tourists, for the very commodification of ICH must lead to some compromises in presenting cultural values, especially when trying to present traditions, family practices, and private events (weddings, funerals, initiations, family meals and so on) for tourists.
- Either there is the potential for a massive invasion of privacy or some kind of trivialization of the asset.
- Either community amenity or authenticity suffers.
- One solution has been to turn these events into performances. Doing so separates them from the local community, reducing the potential for adverse impacts, and can also create an authentic tourist experience.

# CONTEMPORARY CULTURE AND THE ADVENT OF CREATIVE TOURISM

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- Much of the focus of cultural tourism is placed on historic sites and ancient traditions.
- Yet, the range of cultural tourism products extends to include the contemporary, from the tangible (iconic buildings and other structures) to the intangible (performing and visual arts, events, festivals, etc.).
- AM authority Derik Chong (2009) notes that discussion of contemporary arts is often placed within a context of CM where much overlap is noted between CM and CHM in the organization, management and delivery of experiences.
- Cultural policy and AM authorities are increasingly trying to encourage the co-creation of contemporary arts activities events, with many activities of interest to tourists.

# CONTEMPORARY CULTURE AND THE ADVENT OF CREATIVE TOURISM

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- Producers of contemporary culture are increasingly describing themselves as more than just artists, writers, inventors, communications or IT types.
- Instead, they prefer the broader term 'creatives', partially in response to Florida's (2002) identification of a 'creative class' and also because much of the work transcends traditional labels.
- In a similar manner, they prefer to use the term 'art ecologies' (Chong 2009; Hager and Sung 2012) to describe the intricate linkages and interdependent relationships that exist between and among stakeholders, the community, and the general public.
- Understanding the nature and health of arts ecologies is important for the establishment of a place-based sustainable advantage that makes the most of available creative capital (creativity, creatives, creative processes and arts ecologies).

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# PRODUCTS IN CULTURAL TOURISM, CULTURAL TOURISM PRODUCTS, ASSESSING PRODUCT POTENTIAL, MARKET APPEAL/ROBUSTICITY MATRIX: A SITE SPECIFIC AUDITING TOOL



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Operační program Výzkum, vývoj a vzdělávání



# CULTURAL TOURISM PRODUCTS - INTRODUCTION

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- Two features drive tourism: attractions and access. If neither exists, then tourism does not exist.
- Attractions are demand generators that give the customer a reason to visit a destination, while access provides a means to reach the destination or the product within the destination. These two must work within a fine balance.
- Clearly, if demand generators do not exist, people will not visit, regardless of how strong the access is.

# CULTURAL TOURISM PRODUCTS - INTRODUCTION

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- No place can be successful without an appropriate range and depth of attractions, both to draw visitors and keep them there for extended periods of time.
- Likewise, if access is poor, people will have difficulty visiting even if latent demand is high.
- As a general rule of thumb, then, the potential appeal of the product must exceed the potential cost associated (in time, money, or effort) to access it. If costs are low, people will participate even if the assumed benefit is modest. But, if access costs are high and anticipated reward low, people will not visit.

# CULTURAL ASSETS AS TOURISM PRODUCTS

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- The concept of a tourism product is complex as it involves elements of service, hospitality, free choice, consumer involvement, and consumption of experiences that must be actualized in some way (Hsu et al. 2008).
- Products might be continuing or transient, built, fixed, or transportable. But the fundamental definition of a product is "anything that can be provided to a market for attention, purchase, usage, or consumption that might satisfy a need or demand" (Kotler and Turner 1989: 435).
- "Consumption that might satisfy a need or want" is the essential phrase here. In other words, individuals buy items to benefit from them or to solve their issues, not because they are good products in and of themselves.
- Products can therefore be simply stated as problem-solvers for actual or latent issues.
- These remedies are packaged as consumable objects that the individual can consume.

# THINKING CONCEPTUALLY OF PRODUCTS

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- A product can be conceived conceptually as having three levels or dimensions: core, tangible, and augmented.
- The most crucial component of a product is its core, which outlines the primary advantage or resolution it offers when used. It responds to the queries, "What benefits does it provide ME?" and "What personal requirements is the product actually satisfying?"
- Without asking and providing clear answers to these questions, no product can prosper. As a result, deciding who will use the product and what needs it will meet comes first in the product development process.
- Adopting a marketing strategy is appealing since the primary issue being solved can differ significantly, even for broadly comparable products.
- Due to this variety, many suppliers can individually position their products in line with the benefits being touted.

# THINKING CONCEPTUALLY OF PRODUCTS

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- Identifying the core product and the core audience is vital in the sustainable development of cultural tourism.
- Defining the core product facilitates a range of marketing tactics that can communicate an effective message about the key attributes of the attraction, stimulate some to visit and also discourage others from visiting.
- It sets expectations of the type of experience to be gained, modulates demand by discouraging peak season use, and controls visitor's actions while at the attraction (McKercher and Ho 2003).
- In addition responsible marketing must take into account the needs of the host population, which may be quite different from those of tourists.

# THINKING CONCEPTUALLY OF PRODUCTS

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- The second level is represented by the physical product.
- It stands for the fundamental product's physical expression, which makes it easier to meet needs.
- Many individuals find it challenging to understand this idea because they are so focused on buying material goods that they don't consider how their deeper wants will be met. In fact, one of the most effective aspects of cultural tourism is the way its tangible objects subtly communicate an anticipated experience so well that consumers would react to the product without questioning it.

# THINKING CONCEPTUALLY OF PRODUCTS

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- A fort signals history and struggle, an art gallery signals beauty, ruins signal the deep past, and so on.
- The third element of a product is the augmented product.
- Augmented products provide additional features above and beyond the tangible product that add value and facilitate easier satisfaction of the core need.
- It could be something such as a free shuttle to and from the hotel, the provision of umbrellas for rainy days, a souvenir at the end of a tour, or a money back guarantee.

# THINKING CONCEPTUALLY OF PRODUCTS

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- Ideally product development begins with the identification of the core product, which then informs the creation of the tangible product, which is then supplemented by adding features of the augmented product that are seen to add value to the consumer.
- The marketing message associated with the core product is ideally controlled or influenced largely by the enterprise that produces the product.
- This situation occurs often, but not exclusively, within cultural tourism. It is certainly evident in purpose-built attractions, including theme parks and museums, as well as festivals, events, and the performing arts.

# PRODUCTS EXIST TO SATISFY CONSUMER NEEDS

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- Historically products were developed and markets were sought that might be interested in purchasing the product.
- This push approach adopted the 'if we build it they will come' philosophy and has resulted in some of the great product failures of our time.
- Now, product development begins by understanding what the market wants and then devising goods and services that satisfy those wants.
- This lesson is slowly being learned by the tourism industry, and especially by not-for-profit community organizations offering cultural experiences for tourists (Ashley et al. 2005; Snowden 2008).

# PRODUCTS EXIST TO SATISFY CONSUMER NEEDS

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- Cultural products should be treated initially no differently than toothpaste when considering how to actualize their potential.
- Tourism is the quintessential example of a sector that must adopt a marketing approach to products, for it sells dreams.
- People participate in cultural and heritage tourism to have an inner need satisfied, regardless of whether the person is seeking a deep or shallow experience.

# A MARKETING APPROACH TO PRODUCT DEVELOPMENT

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- Thinking of cultural assets as products means they also need to be managed the same way as any other product.
- The most suitable way to do this is to adopt a marketing approach to asset management. Doing so provides a number of benefits, whereas the failure to do so presents a number of threats to the sustainability of the asset.
- Marketing involves more than sales. It is an overarching management philosophy that seeks to link consumers and products to provide appropriate experiences that satisfy both the needs of visitors and help the organization achieve its long-term financial and non-financial objectives (Sandhusen 2008).
- Non-financial objectives, such as conservation, preservation, education, and the creation of awareness of the cultural or heritage significance are often more important than financial goals, especially given that many cultural tourism products are owned by government agencies, trusts, or other not-for-profit organizations.

# A MARKETING APPROACH TO PRODUCT DEVELOPMENT

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- The ability to maintain control over how an asset is used is, arguably, the key benefit of adopting a marketing approach, by controlling how the product is shaped, what message is conveyed to the consumer, and who a desirable type of visitor is (McKercher and Ho 2003).
- Indeed, the most common impacts felt at cultural sites, including over-use, underuse, and inappropriate use, can be traced to the failure to adopt a marketing approach.
- Understanding the motivations behind visitors' visits and determining the ideal visitor type allow the experience to be tailored to meet their needs in a way that is consistent with the asset's larger CM objectives.
- Even though assets are there to meet tourist demands, this does not give the visitor a free pass to do whatever they choose. Additionally, it does not imply that all visitors should have the same access permissions. The exact opposite is, in fact, true.

# A MARKETING APPROACH TO PRODUCT DEVELOPMENT

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- The asset managers may describe the main product in their own terms thanks to the marketing strategy, and by doing so, they can identify and target the right kind of visitor.
- It might also entail adopting a number of pricing and demand control strategies, as well as outlawing certain behaviors. Demarketing is a goal of marketing just as much as raising demand; it aims to lower demand, move demand across seasons, or shift pressure from weak areas to stronger ones.
- Doing so can increase the asset's value by demonstrating that the experience is actually one of a kind. Explaining the reasons why something is prohibited could enhance the experience being had.

# A MARKETING APPROACH TO PRODUCT DEVELOPMENT

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- It must also be appreciated that the same product can be presented in different ways to satisfy different market segments. This is because people can create differing images from each other of the same location (Ashworth 1999).
- A historic site can be presented in a more superficial way to appeal to the casual and incidental cultural tourist, while added interpretation and the opportunity to engage the site more deeply can appeal to the sightseeing and purposeful segments.
- In other cases, though, the disparity between the needs of different users may be too great to be bridged. It may be an honourable goal to appeal to as many users as possible, and it may even be written into the mandate of publicly owned assets, but in practical terms no product can be all things to all people.

# PRODUCTS AS ATTRACTIONS

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- Many more will be of little or no interest to tourists, while some may be of limited interest.
- According to tourism theory, there is a distinct hierarchy of attractions in the majority of travel sites, and this hierarchy is based on how compelling it is to visit each attraction (Leiper 1990).
- The potential of the attraction to generate demand is directly related to how well it can pull tourists from a distance. Lesser attractions may offer visitors entertainment while they are at a location, but they do little to entice them there.
- Therefore, attractions can either be a crucial component of a vacation and a key factor in choosing a place, or they can be a purely optional activity that is done while traveling.

# HIERARCHY OF ATTRACTIONS

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- There are three broad categories of attractions: primary, secondary, and tertiary.
- Most places place such a high value on their primary attractions that they rely heavily on them to shape public perception and drive tourism (Mill and Morrison 1985). As one climbs the hierarchy of the attractions, the decision to buy becomes more and more subjective.
- Although secondary attractions may be noteworthy locally and merit making the effort to see when traveling there, they are rarely the main draw for tourists. Instead, they enhance the travel experience and may even be quite well-liked in and of themselves, but they do not affect travelers' choices of where to go. Convenience-driven, low participation buying decisions are typical of visits to tertiary or lowest rank attractions.

# HIERARCHY OF ATTRACTIONS

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- Depending on the importance of the reason for visiting, the same attraction may serve as a primary, secondary, and tertiary attraction all at once. This topic is covered by Barbieri and Mahoney (2010) in their discussion of the performing arts.
- Some people may go to a place just to attend the theater, the arts, or special performances, making the arts their main draw.
- Other people might come for a variety of reasons, including a night at the theater as one of their numerous travel-related activities.
- For these people, the performance is a secondary attraction. For others still, performance may be a tertiary attraction, whereby the performance did not play any role in the trip decision but they make a spur of the moment decision to purchase tickets.

# CULTURAL TOURISM ATTRACTIONS EMBEDDED IN THE BROADER DESTINATION ATTRACTION MIX

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- Cultural tourism attractions do not exist in isolation from the destination's other tourism products, possible activities, and overall destination image. Instead, they represent part of the product mix found in most destinations (Ashley et al. 2005; Munsters 2012).
- As such, the decision to visit involves more than simply choosing which of many temples or historic buildings to visit. It also involves a more basic decision whether to include any cultural site in the itinerary or to participate in something else.
- Cultural attractions, thus, need to offer something special that moves them up the choice set.
- Attractions or activities that are seen to be common, boring, or otherwise not appealing, will not be visited.

# INTEREST IN CULTURAL PRODUCTS DEPENDS ON COMPATIBILITY WITH DESTINATION IMAGE

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- Whether or not the destination is associated with cultural tourism will influence both the volume and type of visitor.
- Cultural products located in places with a compatible destination image have a greater chance of succeeding while those located in destinations with incompatible images will struggle.
- Destinations invest heavily to create a desired image that will appeal to their target markets.
- The image conveys a number of messages about the type of experience tourists can expect when visiting and, just as importantly, defining what they will not experience.
- Products that complement the image tend to receive preferential treatment in marketing campaigns, while those that are inimical to it receive far less attention.

# INTEREST IN CULTURAL PRODUCTS DEPENDS ON COMPATIBILITY WITH DESTINATION IMAGE

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- At the same time, tourists look for destinations that can satisfy their needs.
- Again, the image portrayed will help place the destination on a possible choice set list, while a perception of an incompatible image will result in the destination being overlooked.
- The combination of the consumer's predisposition to seek destinations that are compatible with his or her desired experiences, and the destination's propensity to promote activities that reflect its overall desired image, benefits those products that are congruent with both while also creating equally powerful barriers for those that satisfy neither.
- A place like Hong Kong has a clear image as a sophisticated urban destination. It supports this image through the promotion of shopping, dining, sightseeing, and festivals. Tourists thinking about an urban holiday would place Hong Kong on their choice set. Few people realize, though, that it also contains 10 percent of the world's identified soft coral species and that some businesses offer diving tours to see these corals. Why? Such nature-based experiences are not compatible with its urban image and, because of that urban image, few tourists would consider Hong Kong when thinking about a nature-based holiday. Thus, local operators offering such experiences face the dual challenge of offering a product that does not support the destination's image and operating in a destination that tourists simply do not see as a nature-based option.

# STRANGENESS VS. FAMILIARITY, THE ENVIRONMENTAL BUBBLE

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- The origins of the discussion surrounding the consumption of travel experiences can be found in the work of tourism sociologists in the 1960s.
- They believed that individuals were being exposed to a series of pseudo-events rather than experiencing reality in their daily lives.
- Mass tourism was viewed as a prime illustration of how manufactured experiences had taken over daily life (Boorstin 1964).
- It was assumed that visitors were passive observers who were segregated from the host community and its inhabitants.
- Some people believed they were the victims of an all-powerful tourism business that kept them in tourist neighborhoods and dictated their experiences.
- Others said that tourists sought to be ghettoized and chose to ignore the outside world. The end effect was manufactured tourist attractions that engulfed the visitor in a wall of fantasy (Boorstin 1964).

# STRANGENESS VS. FAMILIARITY, THE ENVIRONMENTAL BUBBLE

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- The act of creating an environmental bubble or reducing strangeness in a product for the tourism sector helps the consumer, the travel business, and the asset itself in a number of ways.
- The ability to place the experience inside a well-known cultural framework, increase certainty about the experience, and, ultimately, give consumers more confidence in the product being eaten are all improved by reducing strangeness.
- Standardization, modification, and commoditization of the attraction's products help the tourism sector and the attraction itself to manage operations more effectively, cut costs, and offer some degree of experience predictability. Significantly, strangeness reduction broadens the market's appeal and improves accessibility for many customers.

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# STRANGENESS VS. FAMILIARITY, THE ENVIRONMENTAL BUBBLE

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- The key here is fitness for purpose. The level of commodification must match the type of experience to be provided, the needs of the visitor, and the legitimate interests of stakeholders.
- It also involves balancing authenticity with practical product delivery concerns.
- Ashley et al. (2005) note maintaining sufficient authenticity in a cultural product that is packaged for tourists is one of the biggest challenges facing the sector. They comment that lack of authenticity can lead to tacky or mundane products and embarrassed or bored guests.
- But, at the same time, being too 'authentic' may not comply with tourist requirements for safety, accessibility and tight scheduling. They suggest, further, more authentic products are most feasible on a small scale, while higher volumes require standardization.
- In addition, heritage site managers and museum spokespeople discuss an extra ethical obligation they face, whereby they must balance edutainment with authenticity (McKercher et al. 2005). While theme parks may be able to be a little more flexible with the truth, museums have a professional obligation to present materials in a factual, culturally appropriate, and culturally sensitive manner (ICOM 2014).

# ASSESSING PRODUCT POTENTIAL - INTRODUCTION

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- The larger social and political framework in which they function is directly related to tourism in general and cultural tourism in particular.
- No matter how enticing the initiative may seem, its chances of success are restricted if the environment is not conducive to the growth of cultural tourism.
- No matter how brilliant the idea, it won't be implemented if the law forbids a certain kind of development. Additionally, the chances of a product succeeding are reduced if the market conditions are unfavorable or if the product is incompatible with the destination's image or other items there.
- It is first necessary to conduct a comprehensive or destination-wide assessment. There are numerous considerations to take into account

# LEGISLATIVE/POLITICAL CONTEXT

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- Any tourismification of cultural assets must work within a legislative or policy framework.
- The presence of international, national, and/or regional tourism master planning, cultural and heritage legislation, policy, charters of principles, and other frameworks can formally dictate, ultimately, if and how many assets can be developed for tourism.
- However, informal networks and collaborative opportunities will also play a significant role.
- A good test of how well integrated tourism and cultural aspirations are at any level is to look at the policies for tourism, culture, arts, and/or heritage and see how much cross-referencing occurs between these documents and how broad the reach is of public consultation involved in their creation.
- Too often tourism policy-making occurs in a very

# CULTURAL/HERITAGE ASSETS

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- Cataloguing serves a number of purposes.
- From a CHM perspective, it ensures that a representative sample of the region's tangible and intangible heritage is conserved for future generations.
- From a tourism perspective, cataloguing seeks to identify icon assets, determine if there is a critical mass of cultural assets at the destination to determine whether to promote it as a cultural tourism destination and what the theme might be for any promotion of that kind.
- In addition, the spatial distribution of these assets will offer insights into how they can be bundled into nodes, precincts, networks, or themed touring routes.

# TOURISM ACTIVITY

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- The popularity of most cultural tourism-related goods or experiences is organically correlated with how well a destination's tourist industry is performing as a whole.
- In order to ascertain whether there are potential to create new goods or enhance existing ones, it is crucial to conduct a backdrop research or situation analysis of tourism flows, evaluate the destination's current position in the market, and evaluate services and infrastructure.
- It is considerably simpler to create marketable tourism items, whether cultural or otherwise, in well-known tourist locations than in underserved locales.

# UNDERSTANDING THE ASSET IN ITS SOCIO-HISTORICAL SETTING

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- Understanding the historical and social progression that resulted in the establishment of the asset is crucial.
- The CHM group believes that creating a tourism product that is removed from its socio-historical setting is not in the asset's best interests.
- In order to invoke related cultural values, the environment that makes up its physical relationship to the surrounding terrain is equally crucial.
- So, rather than being utilized as video presentation background at a site cafeteria, stories given by a storyteller are more evocative of continuity with the past if recounted by a tradition holder in a "cultural area" (such as a market or street).

# UNDERSTANDING THE ASSET IN ITS PHYSICAL SETTING

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- From both the tourist and CHM viewpoints, the aesthetics of the environment must be taken into account.
- An attractive environment will improve the quality of the trip, whereas a dangerous or unappealing environment could make travel less appealing.
- Many industrial and urban heritage buildings are situated in undesirable or dangerous locations.
- Even though these assets may have high intrinsic worth, tourists may not be interested in them if their safety needs are not addressed or the environment is not appealing.
- Additionally, the compatibility of the tangible object with its surrounds contributes to improving the experience by assisting in contextualizing the asset and assisting the visitor in better comprehending its significance.

# ACCESS

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- Use levels will be influenced by accessibility.
- Generally speaking, the likelihood of increased visitation increases with ease of access, convenience, and directness.
- Contrarily, difficult or uncomfortable access may serve as a demotivator unless the travel itself turns into an enjoyable experience.
- Assets near tourist hubs and/or in convenient proximity to them are more desirable than isolated or remote assets.
- In the latter scenario, a perceived barrier posed by distance must be surmounted before a visit may take place.
- Demand will be constrained by both a lack of market access and insufficient physical infrastructure.

# ASSET SPECIFIC CONSIDERATIONS: PLACE AND CULTURAL SPACES - TANGIBLE ASSETS

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- The next stage is to look at the specific asset in question after these bigger considerations have been taken into account.
- Due to the diverse ways that the CHM community conceptualizes tangible and intangible assets, they are included in separate categories.
- However, the same problems must be taken into account from the viewpoint of tourism.
- The idea of "place" can be used to pinpoint problems with the integrated management and development of tangible assets, such as archaeological sites, historic buildings, and precincts, as well as mobile cultural property or objects, like artifacts, historic objects, or possessions.
- When examining tangible assets in a particular location, one must take into account the asset's integrity, robustness, state of repair, and physical state in addition to its cultural relevance and values.

# ASSET SPECIFIC CONSIDERATIONS: PLACE AND CULTURAL SPACES - INTANGIBLE ASSETS

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- With intangible assets, however, a slightly different strategy is necessary because this class of assets can be usefully studied using the concept of "cultural space."
- The idea of cultural space enables all kinds of intangible assets to be connected to a conventional environment that improves how the visitor interprets and absorbs the cultural values of the item.
- Additionally, it provides a framework within which presenters of intangible assets can regulate the visitor experience and address any management and development difficulties.
- Once more, based on both a market viewpoint and a cultural analysis, the evaluation will decide whether or not using tourism is both acceptable and desired. It will also identify what can be done to the asset to turn it into a product.

# CURRENT AND POTENTIAL USES

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- Determining whether tourism usage and visitors are compatible with existing uses and user groups is the essential factor to take into account when looking at current and future users.
- If so, there will probably be fewer issues when the asset is commoditized.
- However, if tourism is seen as an intrusive or potentially incompatible activity, its benefits must be reexamined, or strategies to control tourists' behavior must be established.

# STAKEHOLDER IDENTIFICATION AND CONSULTATION

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- The majority of cultural and heritage assets have several stakeholders, all of whose viewpoints must be taken into account.
- Any management system that has been put in place may become ineffective if stakeholders' requirements, especially those of small stakeholders, are not taken into account.
- Stakeholders' legitimate concerns cannot be immediately addressed if they are not included in the consultation process, as this will prevent them from being heard.
- There are multiple steps involved in the consultation process.
- For an asset to be truly sustainable, stakeholders' continuing feedback must be encouraged so that new problems can be fixed.

# STAKEHOLDER IDENTIFICATION AND CONSULTATION

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- When stakeholders are taken into account, three major issues emerge.
- The first step is determining who has a rightful stake in the asset's management.
- The second step is determining if this interest is direct or indirect, and the third step is making sure the consultation process is impartial and transparent.
- Numerous prospective stakeholders may declare an interest in the tourism plan, depending on its size, importance, and political sensitivity.
- There are those who will be directly and immediately interested, including tradition keepers, traditional owners, indigenous groups, ethnic minorities, or historical users, as well as travel operators and guides.
- Others will have a veiled but equally valid interest.
- Research centers, heritage NGOs, international heritage agencies, other heritage management agencies, historical organizations, conservation groups, local, regional, and national tourism NGOs, the local travel industry, and public sector tourism bodies may all have some legitimate, albeit indirect, interest in the asset.
- However, if the intended use is contentious, several other stakeholders with no legal stake in the asset can also try to claim their right to participate in its management. Sometimes the loudest voices come from people who have the least direct stake in the asset.

# STAKEHOLDER IDENTIFICATION AND CONSULTATION

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- Potential conflicts are much easier to resolve when dealing with stakeholders who have a direct interest in the asset, while they are much more difficult for a small project when stakeholders with no direct interests become involved.
- Those people with direct interests usually know each other, usually recognize the legitimacy of each other's interests and, normally, will strive to find a pragmatic solution.
- Sometimes stakeholders with direct interests may have intractable differences (as discussed in the next chapter), which makes the successful transformation of a cultural asset into a product impossible.
- Stakeholders with an indirect interest tend to treat issues at a more philosophical and political level.
- Ideals are often entrenched, leading indirect stakeholders to view potential outcomes as win/lose situations. While their needs should be considered, too heavy an involvement can result in unnecessary delays that do not necessarily contribute to the best interests of all the direct stakeholders involved.

# STAKEHOLDER IDENTIFICATION AND CONSULTATION

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- Having said this, the line between direct and indirect stakeholders is sometimes blurred, for some direct stakeholders may be physically distant from the asset in question, while indirect ones may be situated in close proximity to the asset.
- For example, UNESCO is a physically remote stakeholder that has a direct interest in all World Heritage areas. As a direct stakeholder with the power to potentially delist sites for a variety of reasons including rapid tourist development, its views must be considered.
- Ensuring that the consultation exercise is both fair and transparent represents the third issue.
- In some places, consultation is undertaken as a rather cynical exercise aimed at being seen to involve the public rather than genuinely seeking input into the planning and management process. Ideally consultation should seek to involve all legitimate stakeholders in the entire planning process.

# STAKEHOLDER ISSUES

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- When indigenous stakeholders, local community user groups, and tradition keepers may be asked to make a sacrifice in order to realize the asset's tourism potential, consultation must start right away and continue as a regular element of the continuing management of the asset.
- The consultation process must be run in an open, transparent way that enables complete participation.
- The entire planning process will go more smoothly if the important stakeholders, spokespersons, and controllers of the asset (where they differ) are identified early on. Additionally, it is crucial that the process be efficiently managed to prevent it from disintegrating into a number of independent parallel processes.

# STAKEHOLDER ISSUES

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- In general, stakeholders have a lengthy history with one another.
- When beginning the consultative process, it is crucial to be aware of things like the power alliances that have developed between and among groups, which stakeholders have taken on leadership roles, the history of interactions between stakeholders, whether there have been any significant conflicts, and whether they have cooperated to find solutions.
- Additionally, tourism frequently represents a strong new stakeholder that can change the balance of power.
- When discussing tourism-related issues, caution must be taken to make sure that all interested parties understand the industry's true power position lest they form exaggerated hopes.

# PEOPLE

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- Finally, no evaluation is complete without evaluating the abilities, skills, and resources of the participants as well as the resources at their disposal.
- The abilities of those directly involved in any project have a direct impact on their capacity to carry out visions and maintain cultural assets as tourist attractions in a sustainable manner.
- A fatal defect that can transform good ideas into failing initiatives with serious management issues is the human aspect.
- It is important to think about how well the participants can carry out a project's objectives and to evaluate their motivations for being involved.
- Does the person have the resources to buy the talents if they are not already there or the capacity to develop them on their own?

# PEOPLE

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- Purchasing talents poses a second essential query: Does the idea's promoter have the financial means to carry it out?
- In general, it is challenging to find funding for conservation efforts.
- However, financing for one-time construction initiatives or site stabilization is typically simpler to come by than for continuous upkeep.
- But tourism-related assets need constant upkeep. What sources will the resources have?
- Concerns regarding the projects' financial sustainability need to be raised further.
- Business plans must be created and thoroughly examined to determine their validity.

# PEOPLE

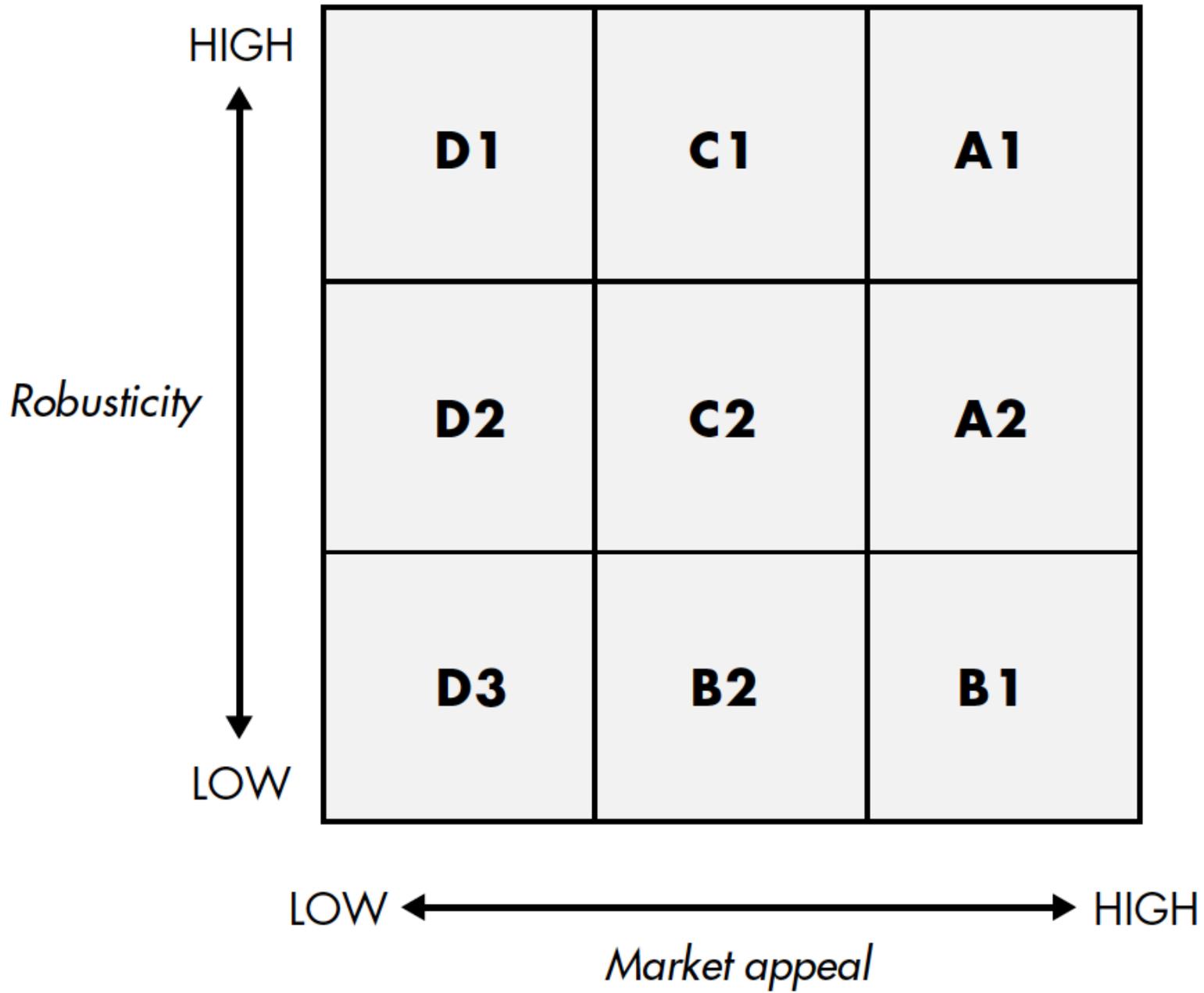
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- Finally, there are still two important questions that require a solution. Why is tourism suggested?
- Is travel a means to an end or a means in and of itself?
- A cultural asset must only be developed for tourism for tourism's sake.
- Only assets that have a significant draw for tourists, can support visitors, and can be marketed in a distinctive and appealing way should be promoted as tourist attractions.
- If tourism is used to justify the pursuit of other goals, such as the desire to further conserve assets, to prevent them from being demolished, or as a way to get items included on a heritage registry, caution must be exercised.

# MARKET APPEAL/ ROBUSTICITY MATRIX - INTRODUCTION

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- Cataloguing represents the first small step in the road to successful product development: it helps to narrow the selection as not all cultural assets have the potential to become products.
- The Market Appeal/Robusticity Matrix (du Cros 2001) is a proven assessment tool that can be applied in a proactive manner to assess potential and identify management options prior to tourismification or, reactively, to evaluate existing tourism products to identify issues that need resolution. It is predicated on the integration of different elements that constitute its two axes.
- The Robusticity Axis focuses on issues relating to cultural and physical values, while the Market Appeal Axis reflects product and experiential values.



Source: Hilary & McKercher (2014)

# ROBUSTICITY

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- The two values sets that constitute the robusticity dimension determine whether the asset is culturally significant and whether it can cope with the pressures brought by increased visitors.
- The cultural values element, for example, assesses its social, historic, scientific, or educational significance, and further seeks to determine if it is a rare or common example of the type of asset under consideration.
- Importantly, as well, issues relating to social impacts and the desires of stakeholders have to be considered.
- The physical values element focuses primarily on issues relating to the state of repair, fragility of the asset, and the existence of formal plans of management or legislative controls designed to conserve its unique values.
- This evaluation will answer pragmatic questions about the ability of the site to cope with tourists and whether its fabric can be modified without compromising its cultural values.

# MARKET APPEAL

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- The market appeal dimensions focus on whether the asset has the necessary attributes to function as a product.
- The product values element considers the asset and its surrounding area.
- On-site considerations relate to existing awareness levels, whether the place offers enough activities to justify the journey time, and whether it can be positioned uniquely in the marketplace either as a product or for specific market segments.

# MARKET APPEAL

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- Finally, issues relating to amenity provision and the broader context of the destination must also be considered.
- Off-site considerations relate to the appeal of the surrounding area and whether it is conducive to tourism.
- Experiential values focus exclusively on the ability of the asset to provide a high quality experience for visitors. It examines how well it is presented currently and how it could be presented in the future. Importantly, the goal is to determine if the tourists can engage with the place.

# A QUALITATIVE TOOL

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- This matrix is qualitative in nature, even though it was envisioned initially as a quantitative tool.
- Attempts have been made to apply it in a quantifiable manner (Li and Lo 2004; Stamenkovic and Jaksic 2013) with mixed results, primarily because it was difficult to develop absolute weighting measures for context specific issues that may have different impacts.
- For example, the issue of stakeholder willingness to enter tourism may be a paramount concern in some assets but irrelevant in others.
- Likewise, amenities may be critical in remote assets but not particularly relevant in cultural items located in well-established tourism nodes.

# A QUALITATIVE TOOL

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- However, a qualitative approach relies on the professional judgement of the person or people doing the assessment, making it potentially open to personal bias, where the individual's own interests may either cloud their judgement or lead to differing interpretations of the results.
- It has been our experience that pro-tourism stakeholders tend to minimize the potential risks tourism can post heritage assets while heritage managers often fail to evaluate effectively the experiential elements of a product.
- Local stakeholders also tend to overestimate the significance and market appeal of common assets.

# A QUALITATIVE TOOL

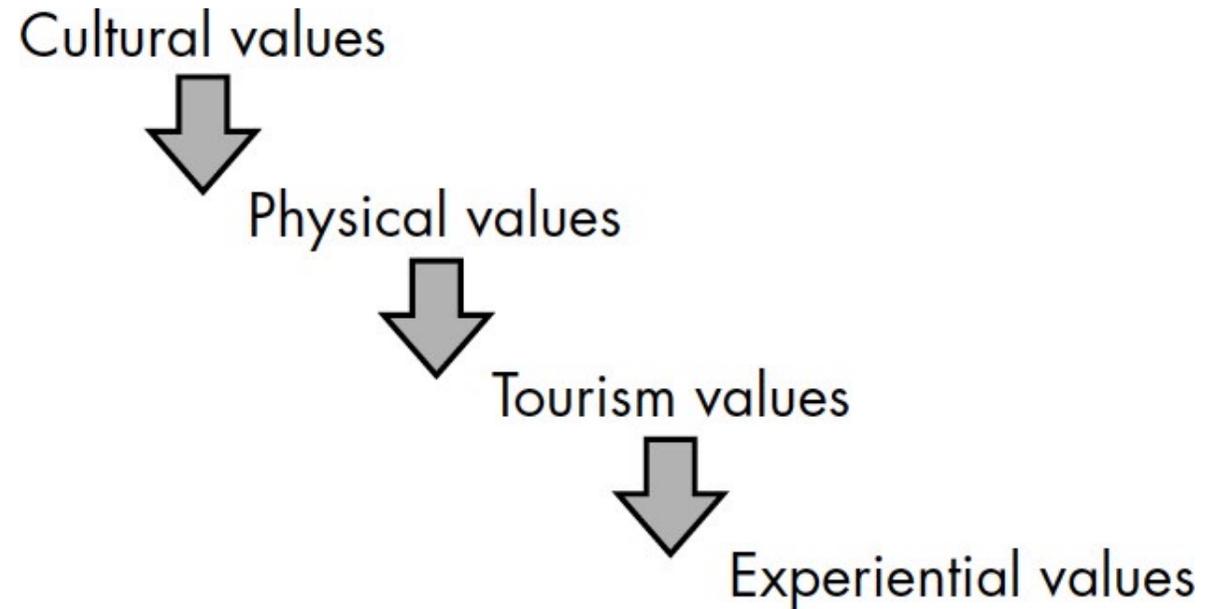
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- It is for this reason that training, pre-testing, and teamwork is encouraged.
- Cultural heritage managers need to be informed about tourism practicalities and the tourism sector must learn the principles of cultural heritage managers.
- Pre-testing is encouraged to ensure consistency in application, especially if multiple teams are collecting information for the assessment.
- Practitioners and others using the matrix can also develop additional sub-indicators to suit their local situation. Ideally assessors should have an arm's length relationship with the asset under consideration to ensure objectivity.
- Finally, the framework seems to work most effectively when small teams are deployed to assess assets.
- Each team member will bring his or her own perspective, bias, and interests. By working collaboratively, a small team is likely to come up with a more reliable recommendation than if an individual works independently.

# OPERATIONALIZATION: A TWO STEP PROCESS

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- Operationalization involves two steps: an initial sequential audit using each dimension separately and an integrative review combining all value sets.



- Source: Hilary & McKercher (2014)

# STEP 1: SEQUENTIAL AUDIT

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- Step 1 involves a sequential hierarchical evaluation of the asset according to each of the four dimensions, beginning with cultural values, and followed by physical values, tourism values, and experiential values.
- Criteria for each value set must be met in order to confirm tourism potential.
- For example, sites need to satisfy the cultural dimension first before physical values can be considered, pass the physical values dimension before tourism values become relevant, and then meet the product criteria before experiential values can be assessed.
- Failure at any stage indicates structural obstacles to the successful transformation of the asset to a product and therefore must be resolved before other elements can be met.
- The purpose of this initial assessment is therefore twofold.

# STEP 1: SEQUENTIAL AUDIT

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- On the one hand, it will enable evaluators to identify fatal flaws that preclude the tourismification of the asset.
- On the other hand, it will help identify non-fatal but still fundamental deficiencies or issues that must be resolved before the asset has a chance of successfully appealing to tourists. ”
- For example, if unresolved stakeholder issues emerge in the cultural values stage, then they must be resolved or else the subsequent tourismification of the asset will lead to conflict and consumer dissonance.
- Likewise, if the asset does not possess the necessary product attributes required to be successful, then the quality of the experiential attributes becomes meaningless because tourists simply will not visit.

# STEP 1: SEQUENTIAL AUDIT

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- Application of this matrix among a number of smaller cultural heritage attractions yielded two important findings that affect the ability of most heritage assets to function as successful tourism products.
- Most places satisfy the robusticity requirements of being culturally significant and able to withstand some increased visitation, with or without minor site modifications. However, the vast majority failed at the market appeal stage, due to either poor product or experiential values.
- Indeed, most attractions had multiple tourism value flaws that collectively represented fatal flaws which effectively negated any potential for successful transformation into products, regardless of the amount of time, money, or effort invested.
- Remoteness (isolated from either tourism nodes or other attractions), weak access (infrequent public transit, poor signage, often needed/closed for use by other user groups and so on), lack of uniqueness (common), poor market access (many similar or better quality examples exist closer to tourism nodes), poor setting (in industrial parks), incompatible neighbouring land uses (in one case a piggery), and unresolved stakeholder issues (where tourism was imposed on unwilling custodians), individually, but more often in combination, were identified as fundamental structural obstacles that could not be overcome.

# STEP 1: SEQUENTIAL AUDIT

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- In addition, the relative competitiveness of small attractions proved to be challenging, again limiting their appeal (Laing et al. 2014).
- Significant experiential weaknesses were identified at smaller and more remote heritage assets compared to better known, better developed, and more accessible attractions, making it difficult for tourists to see the benefits of visiting.
- At best, they could be classified as supporting experiences that on their own do not have the ability to entice visitors but, if properly packaged and bundled, could complement higher order attractions. Improving product and experiential values by the introduction of thematic interpretation, better transport links to peripheral areas, the creation of self-guided trails to connect sites, and allowing public access on a regular basis to excavations might improve their appeal (Laing et al. 2014).

# STEP 2: INTEGRATION

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- Completion of Step 1 will narrow down the full set of cultural assets into a smaller sub-set of those that have some tourism potential. Step 2 determines what that potential is and identifies a range of development and management actions to actualize that potential in a sustainable manner.
- In this step the Four elements are aggregated into their two core axes of market appeal and robusticity to classify each asset according to its potential.
- Heritage sites classified as "A" grade assets have high (A1) to moderate (A2) robusticity as well as moderate to high market attractiveness. They include qualities that appeal to travelers and can sustain high levels of use, making them the perfect choice for substantial tourism activities. To safeguard cultural values against the negative effects of high visitor numbers, only minimal to moderate conservation measures are needed.

# STEP 2: INTEGRATION

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- B-grade assets are low in robustness but have excellent (B1) to moderate (B2) market appeal. Low robustness may indicate that an asset's physical structure is delicate or that its cultural values are vulnerable to major damages from visitors.
- Although tourists may express a significant desire in visiting these locations, their fragility limits their ability to withstand heavy traffic.
- Regardless of control efforts, some tourism will undoubtedly be used. As a result, the management problem is to make sure that visiting does not diminish the asset's underlying worth. In some circumstances, it may be necessary to limit or discourage visitors, while in others, it may be possible to implement conservation and visitor management techniques

# STEP 2: INTEGRATION

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- 'C' grade assets have strong (C1) to moderate (C2) robusticity and a moderate tourist appeal.
- There are two management alternatives. These assets are strong, therefore they could be able to endure more traffic than their current market appeal would imply.
- A management strategy that maximizes the asset's potential or improves the user experience to increase its market appeal may be used. In contrast, management plans can aim to keep things as they are while acknowledging that there won't be much tourist.

# STEP 2: INTEGRATION

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- 'D' grade assets have little market appeal and are unlikely to see much traffic unless they are heavily commodified, virtually completely sacrificing their intrinsic values.
- Other than perhaps for the few purposeful cultural visitors, this type of asset should be handled for purposes other than tourism.
- It could be difficult to persuade asset managers of their limited attractiveness.

# APPLICATION OF THE MATRIX

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- When using the matrix, one can also get advice on whether management decisions should prioritize CHM or tourism.
- When the asset has a great potential for tourism and is solid (A-grade assets), possibly the industry can take the lead in determining the management goals.
- However, regardless of the potential for tourism, CHM considerations must take precedence when the asset is fragile (B grade).
- Similarly, regardless of robustness level, it makes little sense to name tourism as the key management consideration when tourism potential is low (D grade).
- Opportunities for a more balanced link between tourism and CHM goals emerge where there is some tourism attraction and the asset is moderately to very robust. Clarifying asset objectives will also aid in resolving stakeholder problems.

# A PRECURSOR TO SITE AND EXPERIENCE MANAGEMENT

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- Although this topic will be the emphasis of the book's next section, it is important to highlight it now. The use of the audit tools reveals five key choices:
- 1 choosing against include tourism as a goal since the market for the asset is insufficient
- 2 choosing another asset for tourist usage that is less expensive to protect or commodify;
- 3 continuing the development process with the original asset while placing a higher priority on conservation measures to better manage its cultural values in light of anticipated visitor numbers;
- 4 Continue with the original asset, giving commodification and tourism product design needs a higher priority to increase market attractiveness;
- 5 Continue with the original asset, giving conservation measures and commodification/product design needs equal weight.

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