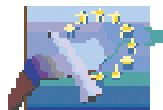




EUROPEAN COMMISSION

**USING NATURAL  
AND CULTURAL HERITAGE  
TO DEVELOP SUSTAINABLE TOURISM**  
in non-traditional tourist destinations



Directorate-General for Enterprise  
Tourism Unit  
*Brussels, 2002*

This publication has been prepared in the framework of a study contract with:



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<http://europa.eu.int/comm/enterprise/services/tourism/policy-areas/>

A great deal of additional information on the European Union is available on the Internet. It can be accessed through the Europa server (<http://europa.eu.int>).

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# Table of contents

<b>1. Introduction</b>	<b>1</b>
1.1 Tourism in Europe – at a crossroads?	1
1.2 Purpose of this publication	2
<b>2. Recent market trends</b>	<b>5</b>
2.1 An expanding market segment	5
2.2 A multiplicity of definitions	6
2.3 Recent trends in natural and cultural heritage tourism	8
2.4 Market potential	12
<b>3. Europe’s natural &amp; cultural wealth</b>	<b>15</b>
3.1 Introduction	15
3.2 Defining natural and cultural heritage	15
3.3 Europe’s landscapes	16
3.4 Protected nature areas	19
3.5 Europe’s cultural heritage	21
3.6 Non-traditional tourism destinations	24
<b>4. Prospects and limits of tourism development</b>	<b>27</b>
4.1 Benefits of tourism	27
4.2 Constraints	28
4.3 Particular issues for tourism based on heritage	30
<b>5. Key success factors</b>	<b>31</b>
5.1 Designing a tourism offer	31
5.2 The ‘art’ of tourism	33
5.3 Ten key success factors	33
<b>6. Assessing tourism potential</b>	<b>39</b>
6.1 Best practice guidance	39
6.2 Principles of tourism supply and demand	40
6.3 Tourism supply	40
6.4 Tourism demand	46
6.5 The final assessment	48
<b>7. Devising a tourism strategy</b>	<b>51</b>
7.1 Why a tourism strategy?	51
7.2 Defining an objective and setting targets	51
7.3 Choice of facilities and services	53
7.4 Product diversification	59
7.5 Quality products	60
7.6 Marketing strategy	62
7.7 Pricing and packaging	64
7.8 Finding allies and networking	65
7.9 Updating and adjusting the strategy	66

<b>8. Creating a viable tourism product</b>	<b>67</b>
8.1 Implementation	67
8.2 SMART projects and business plans	67
8.3 Choice of lead organisation	70
8.4 Sectoral support	71
8.5 Overall coordination and financing	72
<b>9. Monitoring and fine tuning</b>	<b>75</b>
9.1 The need for regular monitoring	75
9.2 Essential ingredients of a monitoring programme	75
9.3 Performance indicators	76
9.4 Stress indicators	78
9.5 Adaptive management responses	80
<b>Glossary</b>	<b>81</b>
<b>Case studies</b>	<b>83</b>
Kuusamo – Finland	83
Pays Cathare – France	91
Shannon – Ireland	99
Eichsfeld – Germany	105
Extremadura – Spain	111
<b>Useful contacts</b>	<b>117</b>
<b>Bibliography</b>	<b>119</b>

# 1. Introduction

## 1.1 Tourism in Europe - at a crossroads?

After almost half a century of sustained growth, Europe continues to be the world's top tourist destination. In the last twenty years alone tourism demand has more than doubled. Its economic impact is equally impressive. According to 1998-2000 figures, 12% of Europe's Gross Domestic Product (GDP) is generated by tourism and tourism-related activities and over 20 million jobs have been created in this sector, essentially within Small and Medium sized Enterprises (SMEs).

This sustained growth is predicted to continue well into the future. According to forecasts by the World Tourism Organisation (WTO), the number of tourists in Europe is expected to double in the next 25 years. By 2020, there will be more than 700 million cross-border tourist arrivals a year. In economic terms, this corresponds to an annual growth rate of 3% and an increase of 100,000 new jobs a year, as experienced in the past few years.

A number of factors are contributing to this continued growth. The introduction of the Euro, the liberalisation of the transport sectors (airlines in particular) and further European integration mean that travel within Europe will be even easier than before. The development of new IT technologies will make it possible to reach additional tourism markets and to simplify holiday planning, especially amongst those interested in independent tailor-made holidays. Finally, the accession of the Central and Eastern European Countries will open up new markets.

This does not mean, however, that it will just be a case of 'business as usual'. What these macro economic figures do not reveal is that there could be some quite significant changes within the tourism sector itself over the coming years in order to



adapt to changing demands, new opportunities and increased competition. Already, the classic «sun and sand» tourism destinations in Europe are finding it increasingly difficult to hold onto their share of the market as new areas develop elsewhere in the world and become more affordable.

'Alternative' forms of tourism, on the other hand, are booming. According to 1999 figures they are growing almost three times (8%) as fast as the classic tourism market. Recent market surveys reveal that more and more people are interested not only in trying out new places but also in discovering different forms of tourism. They are also placing greater emphasis on quality products, more environmentally conscious forms of tourism and on shorter but more frequent trips.

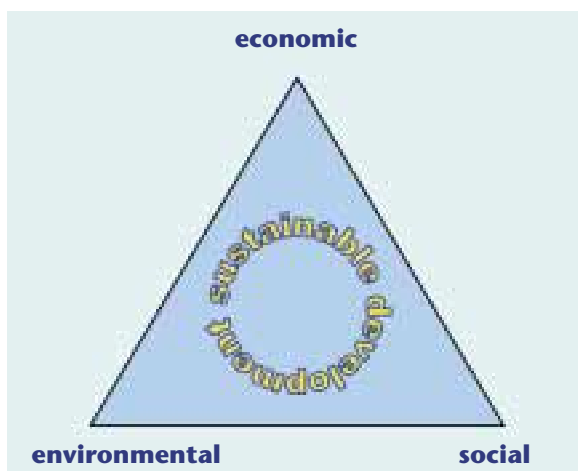
One way to meet these new challenges and to capitalise on changing market preferences in Europe is to consider developing sustainable tourism based on rich natural and cultural heritage. With so many different landscapes, climates, cultural particularities and traditions, languages and natural environments, Europe offers an ideal platform for these more specialised and increasingly popular forms of tourism.

This potential was highlighted by the Commission's High level Group on Tourism and Employment in 1998: '*... one of the constraints preventing European tourism-related business from benefiting from the current favourable market perspectives is their insufficient appreciation of the richness and diversity of attractions available throughout Europe, and which could become the basis for new and original tourist products and destinations.*'

## 1.2 Purpose of this publication

The present publication looks at the opportunities and challenges of developing tourism based on natural and cultural heritage in non-traditional tourist destinations in Europe. As such, it concerns primarily leisure rather than business tourism and focuses on rural areas rather than on urban or already popular coastal or mountain resorts.

The publication is divided into three parts. Chapters 1 to 5 look at the issues that need to be considered when developing tourism based on natural and cultural heritage. Chapters 6-9 provide basic guidelines on how to go about creating such a product in a sustainable manner. The annex contains five case study examples illustrating how this has been achieved in different destinations across Europe.



Because tourism is such a very competitive business it is essential that those who are, or want to become, involved in this form of tourism are fully aware of how it works (for instance the principles of supply and demand), how tourism interacts with other sectors and what its impact might be on the local environment. Only then will it be possible to create a product that will stand the test of time and that is based on the three pillars of sustainability (economic, environmental and social).

The publication is therefore intended for all those who are interested or involved in this



form of tourism, be they SMEs, specialised interest groups, site administrations, NGOs, local and regional authorities or tourism professionals. It does not pretend to be a comprehensive analysis of what is after all a very complex and evolving field, but we hope that it will provide a useful overview of the particularities of developing tourism based on cultural and natural heritage.

In such a competitive market it pays to be well prepared!



## 2. Recent market trends

### 2.1 An expanding market segment

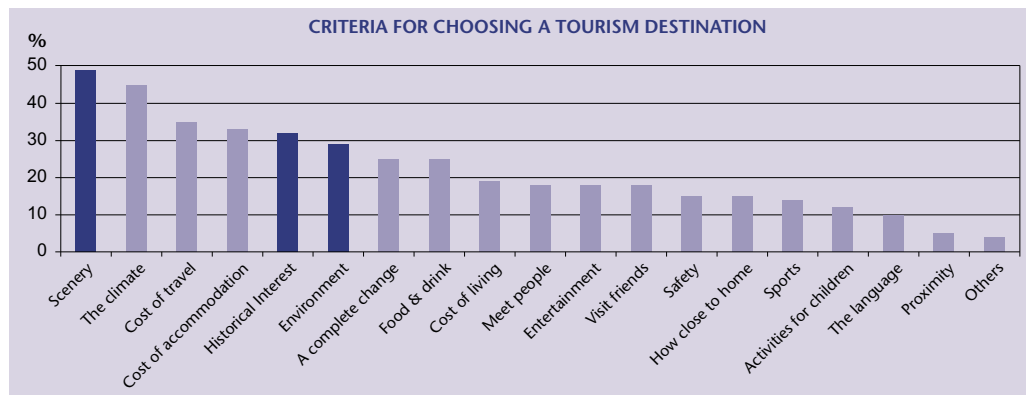
The World Tourism Organisation predicts that most of the increase in European tourism receipts over the coming decade will come from alternative forms of travel not involving the classic 'sun and sand' tourism. This type of tourism is expected to account for over 20% of all travel in the next 20 years and is set to grow faster than any other market segment. Some of the growth will come from a greater volume of tourists, but a significant portion will result from a shift in tourist numbers between the different segments.

There may be several reasons for these shifting trends:

*Changing trends*

- people are becoming more experienced in travelling and discerning in their choice of destination, leading them to search for new places and new tourism products;
- they are more mobile - cross border travel is easier than ever thanks to the liberalisation of the airlines, construction of new roads and European integration;
- they are taking shorter but more frequent holidays throughout the year;
- they are more active whilst on holiday, seeking out different activities,
- the European population is getting older but staying active longer;
- and finally people are increasingly concerned about the environment.

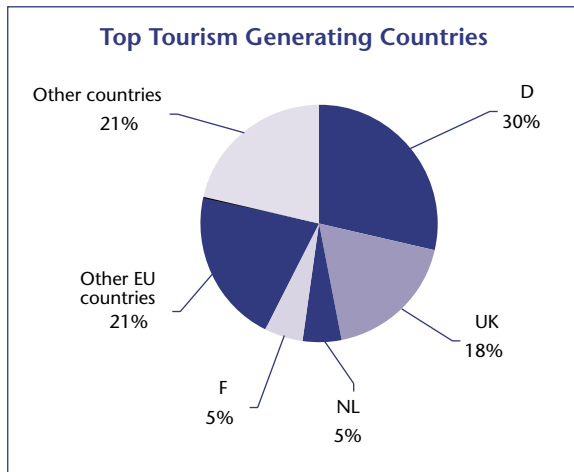
These trends are reflected in the findings of the last Eurobarometer survey on Europeans on Holiday (1997-1998). According to this survey, on average, one in two Europeans went on holiday away from home in 1997 and a significant proportion took more than one holiday in the year (33% took two, 11% took three holidays). Their average length of stay was 7 days or less in 63% of the cases. The majority travelled by road using their own car (58%) or flew (31%).



From Eurobarometer survey: Europeans on holiday 1997-1998

*Natural and cultural elements are top parameters influencing choice of destination*

So far, the sea is the most popular choice, (63%) but a significant number of Europeans also cite the countryside (23%) as a preferred destination. As to the criteria for choosing one area over another, not surprisingly the climate figures prominently (45%) but so do other factors such as scenery, historical interest and the environment, which are on a par with the cost of accommodation and travel.



In terms of countries chosen for holiday, the majority of Europeans stay in their own country. Citizens from Germany, UK, Netherlands and France are amongst those most likely to travel across borders. Their first choice is either France or Spain. These two countries have been top destinations for many years and together make up over 38% of the Intra-EU leisure tourism market.

## 2.2 A multiplicity of definitions

*Lock of specialised market surveys*

The Eurobarometer survey and other general market surveys clearly illustrate the growing popularity of alternative forms of tourism within Europe. But it seems that almost no detailed market research studies have been conducted on these market segments to understand how they function. Yet, to be able to develop an appropriate and sustainable tourism product it is vital to have, as a minimum, reliable data on market potential and on the target group profiles and expectations. Part of the problem undoubtedly lies in the fact that terms like 'niche' market, or 'eco'-



tourism, 'green' tourism or 'alternative' tourism, are not precise. On closer inspection, each one of these is made up of a very heterogeneous mix of different market segments, which attract different people for different reasons.

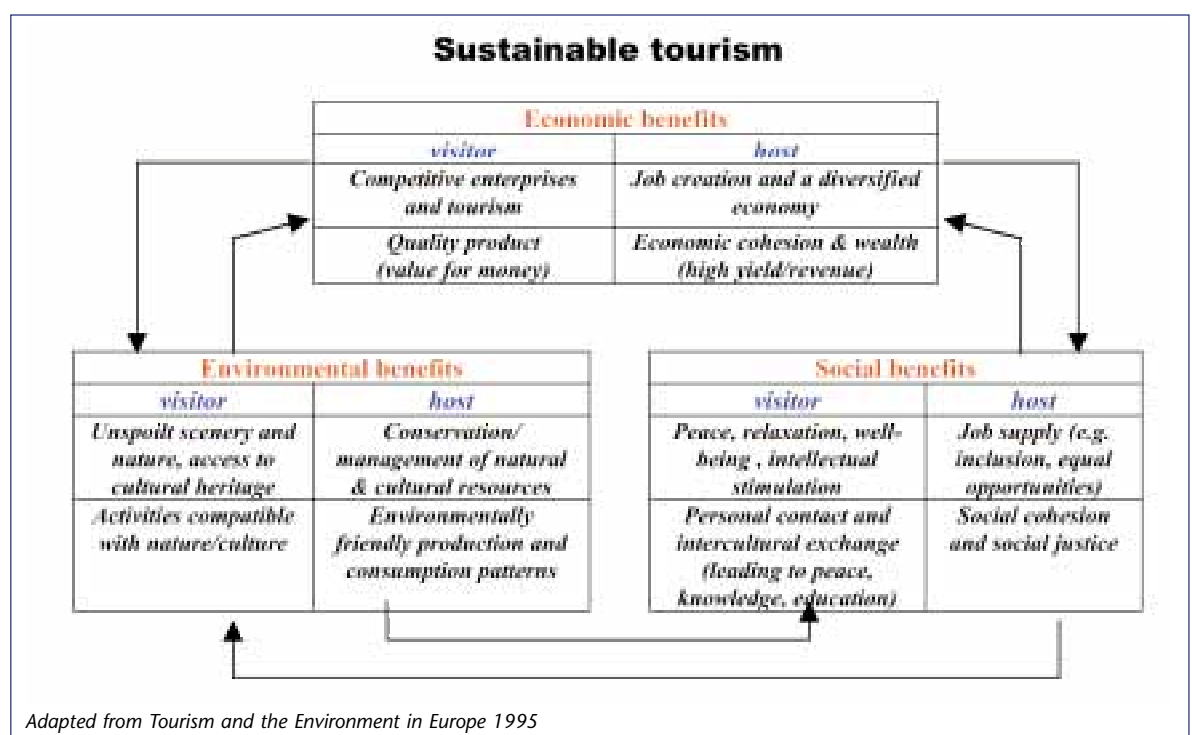
Ecotourism, in particular, has been so widely used and misused that there is now much confusion over what it actually stands for (two extremes include paying lip service to environmental concerns or holidays for ecowarriors!). Whilst these more general terms may serve a useful function amongst policy makers to help orientate their debates, they are now rarely used by tourism professionals to sell their products. The latter focus more on the tightly defined market segments: for instance, nature tourism, cultural tourism, religious tourism, health tourism, sport tourism, adventure tourism...

For the purposes of this study the only term used is that of sustainable tourism as defined by WTO:

*«sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems.»*

All tourism activities should fit into this definition irrespective of which market segments they target. This is especially important for tourism based on nature and cultural heritage where the risk of damaging the environment and the socio-economic fabric of a destination is potentially higher.

Moreover, as tourism volume increases over the next decades there will inevitably be more pressure on these resources. It is therefore not enough to limit damages, there will also have to be some tangible benefits for the area in question - economically, environmentally and socially.



## 2.3 Recent trends in natural and cultural heritage tourism

Creating a visitor profile of the kind of tourists interested in natural and cultural heritage tourism is very difficult due to their diversity of interests and the general lack of targeted market research. Thus, only general comments can be given here, based on the results of practical experience in different tourism destinations.

### Typical tourism activities

Tourists in search of natural and cultural heritage seem to look for a wide range of different attractions and activities designed to satisfy different needs, be they for learning, relaxation, recreation or adventure, amongst others. Some are highly seasonal, but most can be done all year round or in the low season as well (thus allowing the tourism season to be extended). Some can be undertaken in a couple of hours, others need a couple of days, and yet others may require people to stay a week or more. The following are some examples of activities that can be developed using natural and cultural heritage:

Nature tourism:

- walking, hiking, cycling;
- general sightseeing and outdoors, admiring scenery, picnicking, swimming ...;
- wildlife viewing: birdwatching, whale watching ...;
- visiting nature reserves and park visitor centres;
- canoeing, cross-country skiing, horse riding, sailing, boating;
- hunting, fishing, harvesting (berry picking);
- participating in nature conservation: removing scrub, mowing fields ... .

*Popular activities involving natural cultural heritage*

Adventure tourism:

- dog sledging, skiing, skidooing;
- white water river rafting, body surfing, rock climbing, mountain biking, paragliding;
- orienteering, leadership building;
- incentive tours (for companies).

Education tourism:

- field courses in conservation, species identification, rehabilitation;
- courses in local cuisine, making handicrafts, restoration;
- courses in music, painting, language, photography;
- learning about local history, art, heritage.

Culture tourism:

- festivals and events, banquets;
- music, theatre, shows;
- village life and rural life (e.g. farms, Sunday markets,);
- gastronomy, visiting/tasting local products;

- general sightseeing, village buildings and 'atmosphere';
- visiting historic and religious monuments or vernacular buildings, ruins;
- famous people in the region.

Normally, provided these activities are carefully planned, they should be environmentally friendly as they are non-consumptive. However, certain extreme forms of adventure sports, especially when 'off piste' (skiing, mountain biking...) can be very destructive even in small quantities. The same is true for consumptive activities that are not properly managed or regulated (berry picking, fishing, ...).

It is also worth noting that nature and culture orientated tourists are also strongly influenced by the quality and type of accommodation and food on offer. These rarely form an attraction in their own right but they are an essential part of almost every holiday and, if appropriately conceived, can add to the overall attractiveness of the destination.

According to a recent ecotourism survey on German tourists, the four most important expectations for tourists seeking nature and culture orientated holidays were as follows:

- 50% expect small accommodation businesses run by locals;
- 45.6% want to go hiking by themselves and want to be furnished with good information;
- 41.2% expect local cuisine with local ingredients;
- 41.2% expect strong local hospitality; they want to feel welcome.

*Heritage tourists influenced by type of hotel*

From this and other studies, it seems that tourists in search of nature or culture are rarely attracted to large luxury hotels. They will be much more interested in smaller establishments of good quality which provide a personal service and a certain level of comfort and quality - the demand for two and three star accommodation is generally very strong. There is also a small but growing proportion of tourists looking for character and 'charm' in their accommodation. Hotels that use local quality crafts or are located in vernacular buildings are becoming increasingly popular.



According to two surveys of tourists to the Highlands and Islands of Scotland and on the Danish Island of Bornholm, hotels tend to be chosen by couples, visiting an area for the first time and staying a shorter period of 4-7 nights. They are also popular with foreigners. Holiday cottages and camping, on the other hand tend to be for larger groups, mainly families, probably on repeat visits and staying a longer period of 8-10 nights. The cost of accommodation becomes an increasingly important consideration the longer the tourists stay and the larger the groups are.

*Local food enhances the appeal of a place*

Like accommodation, eating is also an important activity for tourists once on location. Those in search of nature and culture are particularly interested in sampling local products and recipes. In Scotland, for instance, 25% of all tourism spend is on food and drink. Whilst price will be a major consideration when it comes to choosing a restaurant, more and more attention is being paid to the origin of the food (local specialities) and its quality (home grown rather than mass produced).

### Common Motivating factors

As stated before, different people are attracted to different forms of tourism for different reasons. Common motivating factors for those in search of natural and cultural heritage often includes one or more of the following:

- Physical well being and health;
- discovery, intellectual stimulation and education;
- enjoyment of unspoilt nature and beautiful scenery;
- contact with people from different backgrounds and cultures in a more personalised and intimate setting than would be found in the mass tourism destinations;
- or simply just adventure and excitement.

Whatever the motivation though, almost everybody is looking for a personal experience. After all, the only thing left after a holiday is a memory, if the holiday was not satisfactory it is not possible to take it back and get it replaced.

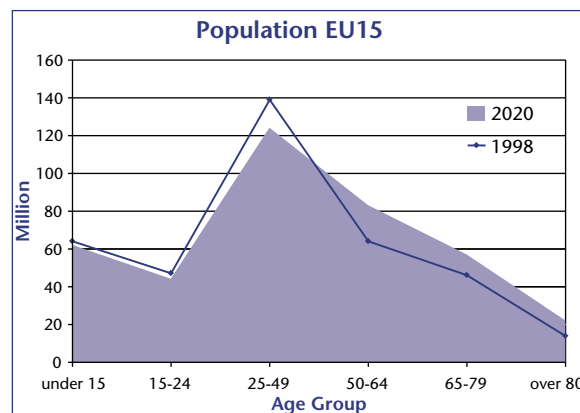
*Tourism is a personal experience*

As a consequence, the choice of holiday is very much based on non tangible factors such as feelings, moods, fashions, trends, ... . Some studies have indicated that the more stressful people's working environment is, the more they find the countryside reassuring. The less people have a sense of direction and security, the more they seek others who are firmly rooted in their community, the more 'industrial' the products, the more people look for authentic goods ... Such global trends are useful to monitor as they will undoubtedly influence future market trends and opportunities.

### Typical tourist profiles

Creating a visitor profile of the typical nature or culture tourist is equally difficult. So much depends on their backgrounds and on what they are looking for once they are on the spot. In very general terms though, it seems that these tourists tend to be in the 39-59 age bracket range and are generally better educated, have a broader travel experience, are more quality conscious, and sensitive to environmental and social concerns. They also regularly take holidays outside normal peak seasons. This, coupled with the fact that Europe's population is getting older, but staying active longer, means that seasonality should be seen as an opportunity rather than a threat for this form of tourism.

In terms of booking their holidays, most tend to travel inde-





pendently rather than through tour operators or holiday packages (except for eco-tourists who use organised trips to help them see what it is they are interested in). The length of stay varies depending on the time of year, is generally around 7 days or less. As far as the choice of destination is concerned there are no clear preferences, although the Mediterranean remains very popular (as do areas close to the traditional tourist destinations, no doubt because they are easier to get to, familiar and less costly). A recent survey undertaken of brochures issued by specialist tour operators in the UK identified almost as many destinations as tour operators, which seems to confirm that there is substantial choice but no obvious geographical preferences.

*Heritage  
tourist stay  
for 7 days  
or less*

Because of the range of interests it may be more useful therefore to make a distinction between the committed tourist, the interested tourist and the casual tourist.

- The *committed tourist* plans a holiday so that the activity accounts for the majority of his/her holiday time. Birdwatching, hiking, working with nature, participating in educational courses fit into this category. Birdwatching in particular is said to be one of the fastest growing outdoor pastimes in the world, wildlife viewing is growing by approximately 10-12% per annum in the international market. Whilst this type of tourism tends to make up only a small part of the total tourism market, it is nevertheless interesting because it tends to be quite lucrative and is not necessarily seasonal. These tourists also have a high level of environmental and social awareness.



- The *interested tourist* plans his/her trip in order to be able to spend some time on a particular interest without focussing exclusively on it. They actively search for this type of attraction and choose a destination accordingly. They also have a high level of environmental sensitivity but in a less 'purist' way. Walking, cycling, visiting nature reserves, attending festivals and events tend to fall into this category. These activities have a strong drawing power, which is important for gaining a competitive edge and encouraging return visits. The interested tourist is also likely to stay longer in order to try out other activities even if this is on a more seasonal basis.

*The  
diversity of  
activities is  
important*

Walking for instance, is a major preoccupation for Europeans these days. In Scotland, walking accounts for 18% of all tourism expenditure, in 1998 the walking market generated an estimated 1.1 million trips, during which visitors spent over €600 million. This activity is considered to have excellent prospects for the future - provided it is carefully developed and marketed.

- Finally, *the casual tourist* is unlikely to plan his/her holiday in function of any one particular activity, but may be strongly influenced by the sheer diversity of attractions available and by the ease of access. These people tend to be more interested in the destination as a



whole - the social and natural environment, beautiful scenery, attractive villages, local hospitality, with a range of things to see and do. As such it is likely to be of most appeal to the domestic and regional market, as well as families.

## 2.4 Market potential

Whilst some very general indications have been given in this chapter as to the possible profile and tendencies of tourists interested in nature and culture, there is clearly a need for more coordinated and large-scale market research on this subject.

The information would not only help to identify visitor profiles and expectations, but also provide more accurate information on the market potential for these different market segments. Whilst most tour operators and tourism policy makers predict a sustained and continued growth in this type of tourism, there is no way at present of actually knowing what that market potential might be and if it has already been met. Yet, in order to develop a product that is attractive to the 'right kind' of tourist, it is essential to know whether there is actually a market for it and how competitive this might be (e.g. through benchmarking studies). Otherwise, as is all too often the case, there is a tendency to create more supply than there is demand.

**Market analysis of a sample of tourism market segments in Scotland  
(derived from [www.scotexchange.net](http://www.scotexchange.net))**

Type of tourism	Type of activities	Type of tourist	Motivation	Holiday profile	Size of market and potential
<b>Nature tourism</b>	Walking	Broad section of people, mainly couples without children, over half under 44, higher income brackets.	Health and well being, quiet, nature and scenery	Very seasonal April-Sept. Average stay 7 nights.	1.1 million trips in 1988, spent over €600 million Excellent prospects
	Wildlife watching	Relatively affluent, well educated, mature, environmentally focussed (e.g. empty nesters - children grown up and left home).	Nature and education.	Seasonal, depends on the right time to see species – trips average 7 days.	Generates €70 million and supports 2000 jobs - birdwatching is fastest growing pastime in world - hence very good prospects
<b>Cultural tourism</b>	Festivals, events, heritage sites, villages, sightseeing	Above average income, 45-64 age group, mostly couples, sometimes called the 'grey panthers'	Discovery, learning experience, contact with people.	Less seasonal, Generally short trips depending on events. When part of sightseeing trip then mostly in summer.	200,000 people attracted for culture alone spending €50 million. One in seven UK tourists on holiday in Scotland also participate in a cultural event whereas 50% overseas do so Very good prospects
<b>Educational tourism</b>	Sightseeing trips, courses, lectures	Foreigners (e.g. American alumni groups), mature people usually retired and in groups.	Education, discovery, contact with people.	All year round, tend to avoid peak summer months and generally take longer trips.	High income per head – no detailed figures of market share. Good prospects
<b>Field sports</b>	Hunting Fishing	Older market, mainly men, 35-55, sometimes part of incentive holidays	Challenge, excitement.	Seasonal, generally short trips.	210,000 visitors a year, income of around €70 million. Good prospects



## 3. Europe's natural & cultural wealth

### 3.1 Introduction

As the previous chapter illustrates, there is clearly a demand for rural heritage-based tourism. This chapter takes a look at what Europe has to offer in terms of natural and cultural heritage, and attempts to identify areas within the EU that are still, as yet, relatively unfrequented by tourists.

This is by no means a comprehensive analysis. The level of cultural and natural diversity is truly astounding, yet, it seems that relatively few of Europe's diverse heritage features has been inventoried in a systematic way up to now. Some Member States are more advanced than others in this respect and a number of European initiatives are currently underway to help identify areas of European significance, but these tend to represent only a small proportion of the total.

Nevertheless, the present overview may provide some useful pointers, if only to highlight the sheer wealth of natural and cultural heritage within the European Union.

### 3.2 Defining natural and cultural heritage

For the purposes of this publication, the following definitions apply:

- *Heritage* involves two factors:
  - A sense of *belonging* i.e. a form of heritage that is inextricably linked to the area in question and has a clear association with it. For instance, a local custom or festival which is characteristic of the area.
  - It also involves a sense of *time*: i.e. one that is based on the history or geography of the place and that has been passed down through at least one generation. An important consequence of this is to exclude contemporary culture. This is not to under-estimate the importance of today's creative cultural processes, which will become part of tomorrow's heritage, but they are not considered here.
- *Natural heritage* is taken in its broadest sense and covers not only the wildlife and habitats of a particular area, whether protected or not, but also its geological features and landscapes/scenery. Landscapes provide an important scenic backdrop for many tourists whilst on holiday. Geological features provide opportunities for undertaking nature orientated activities (lakes and rivers for watersports, deep valleys for cross- country skiing, walking or bicycling, cliffs for rock climbing, ...). Whilst national parks and protected areas offer those who are curious about unusual or characteristic habitats and species a chance to see and learn about them or to experience relatively 'unspoilt' natural areas.
- *Cultural heritage* encompasses any cultural expression transmitted from the past and inherited by the present day society. This can take on a material form such

*Europe has a wealth of natural and cultural heritage*



as a structure or building or, as is more often the case, an immaterial form such as tradition, know-how, lifestyles, customs ...

Natural and cultural heritage features, especially when taken together, are essentially located in rural areas of Europe away from big cities and urban conurbations.

### 3.3 Europe's landscapes

The richness and diversity of rural landscapes in Europe is a distinctive feature of this continent. There are probably few places in the world where the signs of human interaction with nature are so varied, contrasting and localised.

These landscapes have been shaped by a multitude of natural and man-made forces. In terms of natural forces, Europe has a complex and fragmented geology and geography. Large plains are interspersed by mountain ranges and almost completely surrounded by an extensive and varied coastline harbouring large numbers of islands and peninsulas. It also has very variable meteorological and climatological conditions ranging from the warm Mediterranean in the south, through temperate in the west and east, to boreal in the north.

*Diverse landscape influenced by man*

These natural forces have, in turn, influenced the type of vegetation present. Six distinct biogeographical regions have been identified within the EU, each hosting a wealth of characteristic and unique habitat types and ecosystems from forests, grasslands, deserts, tundras, marshes, rivers, lakes, coastal and marine ecosystems, etc.

Few areas in Europe remain in their natural state though, almost everywhere there are traces of human interaction resulting from centuries of migration, settlements and land reclamation. In terms of land use, agriculture can be singled out as hav-

ing had by far the most influence on Europe's landscapes, habitats and species depending on the natural (climate, soil, vegetation, access) as well as human forces involved (demography, intensity of use ...).

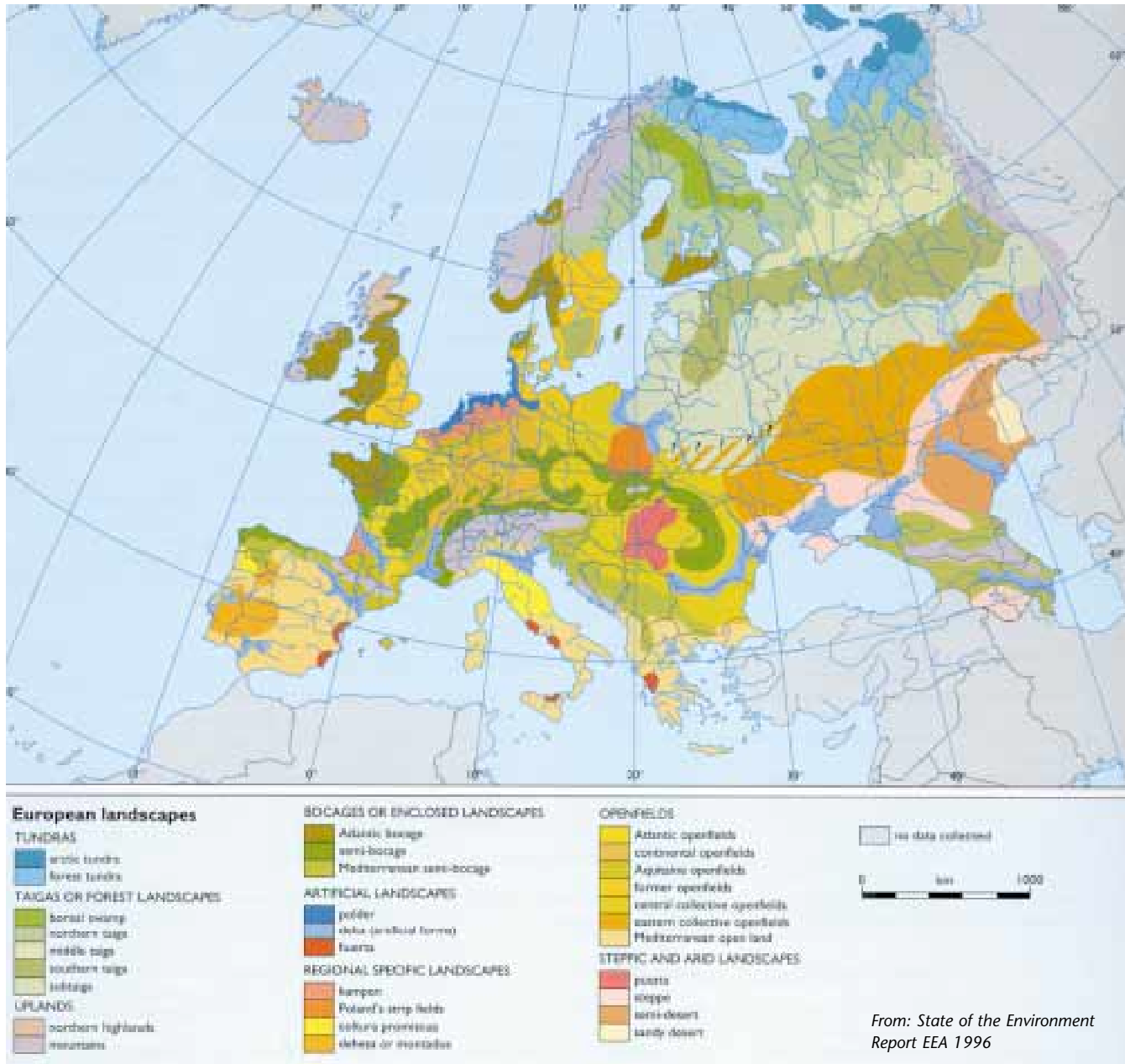
There seem to have been few attempts to inventory these different landscapes. Some Member States have made more progress than others – for instance, in Germany, a comprehensive review was made of its historical cultural landscapes and landscape elements in 1998. This involved substantial field work and literature research into current and past land use practices and historical influences across Germany (e.g. Roman, Germanic, Slavic, ...), and included a thorough analysis of old maps. In the end, 76 distinct cultural landscapes were identified, described and mapped.

Information is also scarce on the European level and few coordinated policies exist for the recognition and conservation of landscapes, although there have been recent discussions about the establishment of a pan-European biological and landscape diversity strategy under the auspices of the Council of Europe. Also, a small but significant number of landscapes have recently been listed under UNESCO's World Heritage Sites (e.g. the agricultural landscape of Southern Öland in Sweden, the cultural landscape of Sintra in Portugal or of Fertő/Neusiedlersee on the Austrian/Hungarian border).

*Landscapes  
of  
European  
importance*

The European Environment Agency (EEA) has been involved in these issues too in recent years. As part of the Dobris report on the state of the European Environment in 1996, it identified 30 specific landscape types of European interest. These vary from open (field) landscapes such as deserts, openfields and arctic tundra to completely enclosed (forest) landscapes, such as bocages (hedgerows), taiga and forest tundra. The EEA is also in the process of developing a GIS information system called NATLAN, which will bring together the information collated over the last 20 years through the Corine Biotopes and Land Cover programmes. Amongst NATLAN's main outputs will be maps based on an analysis of nature and land cover data as well as further refinements on landscapes. This could be an excellent tool for identifying whether a destination has a particularly distinctive landscape or natural interest in the European context.





### Some examples of landscapes of European interest:

- The *dehesas* of Spain and *montados* of Portugal, are traditional agro-silvi-pastoral landscapes characterised by a random dispersal of oak trees. They are surprisingly productive, providing on a rotational basis, food for pigs, shelter for the transhumance sheep, and regular supplies of cork. They also harbour a particularly high diversity of fauna and flora;
- The *bocage/hedge fields* along the Atlantic coast, have been subject to mixed cultivation practices (cattle farming and agriculture side by side) for generations. As a result, the plots tend to be small and often surrounded by hedges and low walls. Thanks to the complex landowner distribution (as many as 100 owners/ha), few such landscapes have been transformed into intensive agricultural land.
- The *Kampen* of Belgium/Northern Germany and France are generally enclosed, with a patchwork layout of woods, heath, swamps, mixed crops and scattered farmsteads criss-crossed by streams and roads. This rich diversity has made the kampen landscape highly flexible for growing crops. Unfortunately, as a result, there are very few such areas left, most have passed over into intensive agriculture.
- The *Tundra*, located in the far north of Fennoscandia, are sparsely vegetated and open. Permafrost and water shortages mean that the vegetation period is very short and intense. Because of their remote location and low productivity these landscape resemble closest the natural conditions.



### 3.4 Protected nature areas

There are estimated to be around 40,000 protected areas in Europe. Most are designed to protect habitats or species under threat. The level of protection varies from strict nature reserve managed mainly for science or wilderness protection to more flexible resource areas or buffer zones where the emphasis lies on sustainable use. The majority of protected areas are relatively small covering 1000ha or less. Together, they form a complex tapestry of protected sites across the European territory.

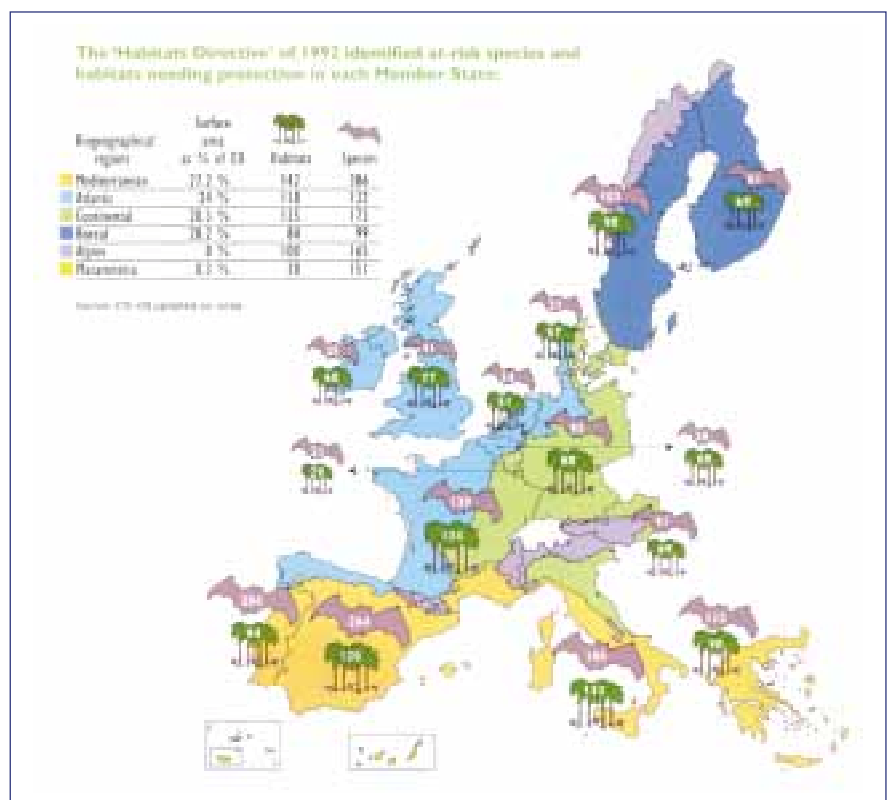


Because these areas are protected under law, every Member State has an inventory, either at national or regional level, of the sites and their characteristics, which can be consulted.

On a European level, legislation has been adopted to protect Europe's rarest species and habitats - altogether 181 species of birds, 200 other animal species, 500 plant species, and around 200 natural and semi-natural habitats are targeted for protection. For each one of these, there is a requirement to designate representative sites in order to ensure their long-term conservation across their whole range within the EU. Collectively, these sites form part of a European Network of protected areas called Natura 2000. So far around 15,000 sites covering almost 600,000 km<sup>2</sup> have been proposed for inclusion in Natura 2000. This is equivalent to an area equal to the size of Germany and Italy put together (more details on <http://europa.eu.int/comm/environment/nature/home.htm>)

*Natura 2000 sites are the 'crown jewels' of Europe's natural heritage*

In a sense, these sites represent the 'Crown Jewels' of Europe's natural heritage. Not all will be suitable for tourism development, either because they have nothing obvious to attract the tourist or because they are simply too fragile. But those that are, will be able to act as show pieces for Europe's rich natural heritage.



Already, protected areas across Europe have seen dramatic increases in visitor numbers in the last twenty years (the Hohe Tauern National Park in Austria, for instance, attracts around 4 million visitors a year) - often unfortunately to the detriment of the site. Sometimes, the very fact that a nature reserve or national park exists in an area is enough to attract tourists (even if they never actually visit it).



*Map of the Corine Biotopes, 1995, European Environment Agency. Data for Sweden and Norway missing)  
Corine Biotopes is an inventory of major nature sites undertaken by the European Commission in 1995. It has since been followed up by the European Environment Agency. For more information go to website: <http://www.eea.eu.int/>*

**IUCN protected areas management categories:**

- **Category I – Strict Nature Reserve/ Wilderness Area:** managed mainly for science or wilderness protection
- **Category II – National Park:** managed mainly for ecosystem protection and recreation
- **Category III – Natural Monument:** managed mainly for conservation of specific natural features
- **Category IV – habitat/Species Management Area:** managed mainly for conservation through management intervention
- **Category V - Protected Landscape/Seascape:** managed mainly for landscape/seascape conservation and recreation
- **Category VI – Managed resource Protected area:** management mainly for the sustainable use of natural ecosystems.



### 3.5 Europe's cultural heritage

Europe's cultural heritage is no less impressive. The legacy of thousands of years of history has not only left material traces, such as historic buildings or distinctive architectural features (dry stone walls, chapels, fountains, vernacular buildings), but also a wealth of immaterial culture, be it customs, folklore, know-how, hand-crafts, culinary specialities, music, dance, ... The list seems almost endless, nearly every village or hamlet has its own distinctive heritage, which not only identifies it, but also differentiates it from neighbouring villages. This is precisely what makes Europe such an enticing and beguiling place!

The majority of countries within the EU have made considerable efforts to inventory and conserve their built heritage. In France alone, over 14.000 buildings have been classified as historical monuments and a further 24.000 are on a supplementary inventory. There are also over 4.000 museums of one form or another and around 2.000 festivals are held every year. At international level, unique and outstanding examples are recognised through their nomination as a World Heritage Site under the auspices of UNESCO. In Europe alone there are now over 200 such sites listed and there can be no doubt that this accolade has a tremendous ability to attract tourists, not only to the actual site but also to the area more generally.

*Over 200  
World  
Heritage  
Sites in  
Europe*



However, when it comes to the smaller or immaterial heritage, the picture is much less clear. This type of heritage involves such a complex, varied and scattered resource that it is extremely difficult to record and inventory it systematically. Some countries have made an effort to do so, the French Ministry of Agriculture, for instance, has produced a 'guide d'observation du patrimoine rural' which describes and lists tangible and intangible heritage features in rural areas of France. This country has also instituted a network of 'écomusées' to conserve different forms of rural heritage 'in situ' and 'in context' across the countryside, but these only capture a very small proportion of the total cultural heritage.

Sometimes, detailed information on an area's cultural heritage can only be found at the local level. This is especially true when there are private individuals or specialised interest groups present who have studied the area's local heritage and lobbied for their conservation. All too often though this remains the exception rather than the rule, rarely do people recognise their own heritage as something special or unique since it forms part of their everyday life.

*Council of Europe cultural routes* Finally, a whole range of more specialised inventories or cultural routes is being developed, essentially through networks or using particular themes. At European level, the Council of Europe has been involved, over the last fifteen years, in the development of a network of European cultural routes that criss-cross the European landscape. So far, over 20 routes have been drawn up extending from the far north of Europe (the northern lights routes) to the far south (the legacy of Al Andalus). One of the most famous is the series of Santiago de Compostella's pilgrim routes, which has enabled less popular tourist regions situated along the

route to recognise and put into value their own particular heritage features.

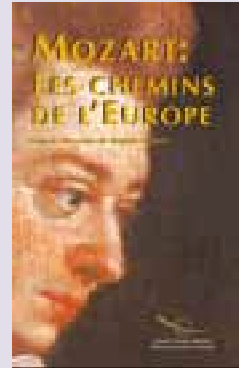
The Council of Europe, has also set up a European Heritage Network (HEREIN). Set up in 1999, its aim is to convert the Council of Europe's paper databank on architectural and archaeological heritage into a system with fast and easy access via the internet. HEREIN also links up with national heritage policies and provides a portal for to a wide range of heritage related activities across the EU. (<http://www.coe.int/>)

In terms of non governmental networks, a number of European or multinational associations are being formed to promote a particular theme or issue relating to cultural heritage in rural areas. Europe of Traditions, for instance, brings together individual home owners and associations from England, France, Ireland, the Netherlands and Portugal who are interested in preserving local vernacular buildings by sensitively transforming them into high quality accommodation that reflect the history, hospitality and heritage of the area.

The quality of the work has been recognised by a number of tourism and environment awards and efforts are now underway to extend their remit to cover small rural villages through a new association entitled 'villages of tradition'. Another example of a European association interested in conserving cultural heritage is EuroArt, which was set up in 1994 to create a European network of Artists' Colonies and Artists' villages and to help raise cultural awareness and recognition of these areas.

#### Council of Europe's Cultural Routes:

- Santiago de Compostella pilgrim
- Via Francigena
- Rural Habitat
- Silk Routes
- Baroque Route
- Monastic influence routes
- Celtic Routes
- Mozart Route
- Schickhardt Itineraries
- Viking Routes
- Hanseatic Routes
- Parks and Gardens route
- Writing Frontiers - Pont de L'Europe
- European Cities discoveries route
- Phoenician Routes
- Routes of Humanism
- The Legacy of Al-Andalus Route
- Northern lights route
- Popular festivals & rites in Europe
- Gypsy Route



Full details on [http://www.coe.int/T/E/Cultural\\_Co-Operation/Heritage/Cultural\\_Heritage/European\\_Cultural\\_Routes/](http://www.coe.int/T/E/Cultural_Co-Operation/Heritage/Cultural_Heritage/European_Cultural_Routes/)



### 3.6 Non-traditional tourism destinations

Despite the sustained growth in tourism over the last 50 years, a significant proportion of Europe is still little frequented by tourists (referred to as non-traditional tourist destinations). A recent analysis of Eurostat tourism statistics, which looked at the number of tourists according to surface area within 1154 regions in Europe, found that the level of tourism density is quite wide-ranging (see map).

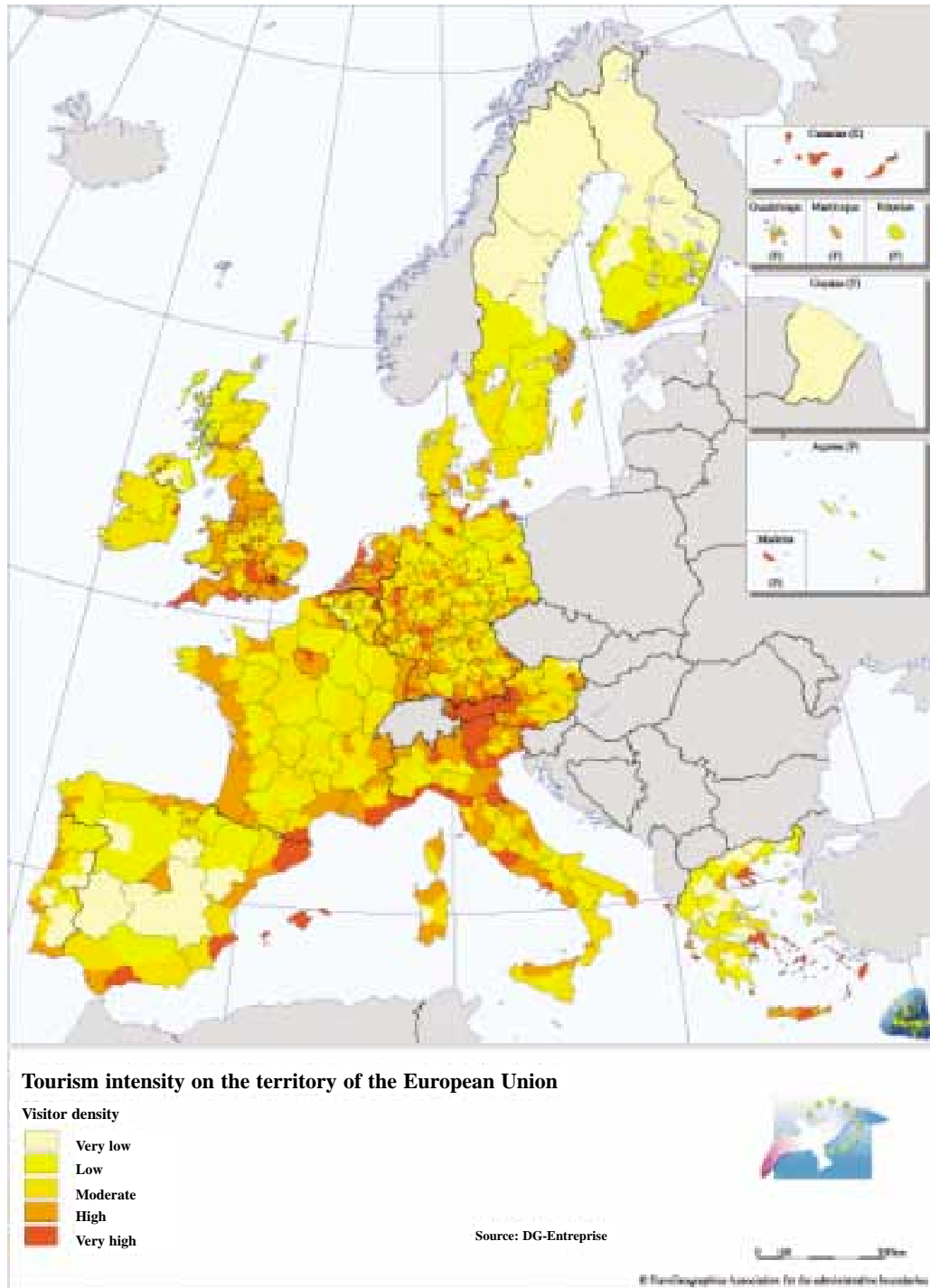
- As one might expect, the more peripheral regions of Northern Fennoscandia have very low visitor numbers, partly reflecting the extremely low population densities in these regions.

*Several areas of the EU are still little frequented*

- At the other extreme, most of the UK, Ireland, Benelux, Germany, Austria and Italy are moderately or even very popular tourism destinations. This is partly due to their relatively high population densities resulting in more business tourism, family visits and short distance tourism. The notable exception here is a number of the former East German Länder.
- France, on the other hand, despite being a top tourist destination in Europe, still has significant areas of low tourist numbers. This is especially true of the central belt running from the Belgian border through to the heart of France and into the massif central.
- Moving further south, Spain, Portugal and Greece all have extensive inland areas with low visitor density, these cover up to a third or even three quarters of their territory.
- Not surprisingly though their coastal areas, and in fact almost all of the European coastline, falls into the category of popular tourist destinations.

Ideally, if one were able to superimpose maps of natural and cultural heritage sites on top of the map of non-traditional areas, it should be possible to identify the 'hot spots' for potential tourism development.

However, even amongst these hot spots, it is not guaranteed that tourism development is possible or that it is appropriate for the local economy. The following chapter examines the benefits and constraints of developing tourism in non-traditional areas using natural and cultural heritage.







# 4. Prospects and limits of tourism development

## 4.1 Benefits of tourism

Europe's rural economy has undergone significant changes over the last fifty years. Farmers, who represent the mainstay of the rural communities and economy have been under sustained pressure to modernise and industrialise their farming methods, particularly over the last fifty years. In several areas, this led to a gradual but steady out migration from the countryside. As a result, many small villages across Europe are today struggling to remain alive despite massive efforts by local, regional and national governments to combat this trend. If the villages go, then so does the areas' cultural heritage, and much of the man influenced natural heritage too.

In such an environment, tourism, with its spectacular growth rates, presents an image of prosperity. This, together with the increasing interest in natural and cultural heritage, could provide a real life belt for many rural and remote areas in Europe. The following lists some of the reasons:

- *New employment opportunities:* Due to its service orientation, tourism is hard to automate, as a result it remains a very labour-intensive market, capable of bringing in significant new employment opportunities and skills, especially for young people. According to the Organisation for Economic Cooperation and Development (OECD) for every €150,000 of revenue generated, 5-6 jobs in tourism can be created, principally in restaurants and hotels.
- *Diversity and stability in the local economy:* Tourism consists of a highly complex system of activities and services, which cuts across a wide range of sectors. As a result, tourism expenditures not only create direct benefits for tourism-related businesses such as hotels, visitor attractions, restaurants etc., but also indirect benefits in other sectors such as agriculture, construction and manufacturing. It can, for instance, increase the demand for local food products, furniture supplies for local hotels or create new markets for handicrafts.... Studies in Norway and France have demonstrated that tourism expenditure on accommodation is followed up by other purchases that can represent 2-3 times more money.
- *A source of additional revenue:* Tourism can also help to provide an additional source of income for existing sectors and small enterprises. In France, farmers who make a few rooms available for tourists are likely to bring in an extra €2.860/year, if they also provide meals this can go up to €3.150, if on top of this they also open a riding stable the revenues can increase up to €11.000 (Leader I ).
- *Improvement of local living standards:* Increased income and taxes generated by new jobs and businesses can

*Tourism benefits a wide range of economic sectors*





be used to maintain or enhance local infrastructure and services.

The overall environmental quality and access of an area may also be improved since tourists prefer to visit attractive, clean and non-polluted places and want to have a good infrastructure for easy access. Furthermore, tourism can, if properly handled, build up a sense of community spirit and cooperation and help 'put the heart back' into a village or community.

- Conservation of local natural and cultural heritage: Tourism helps to develop a sense of pride and awareness about the area's local natural and cultural assets. This, in turn, may encourage a greater understanding and sympathy for their restoration and protection, and so help to ensure more funds are channelled their way.

## 4.2 Constraints

*Rural tourism depends on micro-enterprises*

The list of potential benefits is impressive, but it is important to recognise that tourism is not *the* solution to a struggling rural economy. Forcing its development through generalised governmental policies and funds without taking into account the constraints and pitfalls could prove to be disastrous. Tourism is a very competitive and dynamic business, based on free market principles, and dominated by information and promotional techniques. As a result, there is a high level of risk involved for a relatively low economic return, especially amongst the more specialised markets.

If rural areas are to develop tourism based on their natural and cultural heritage they must be able to overcome the following constraints:

- *The shortage of SMEs or lack of interest in tourism:* This may be either because of a lack of entrepreneurial spirit or because funds are not available to start up a new business. Many rural areas also have a higher than average older population which reduces the potential to start up new ventures.
- *The lack of an organised structure in the tourism business:* Developing a tourism product requires a high degree of coordination and collaboration all along the tourism chain (providing rooms is but one component of the whole product). Considering that the tourism industry is dominated by SMEs (over 94% of companies employ less than 10 persons) it is very likely that, in rural areas, these SMEs will be even more fragmented and under-organised.
- *The lack of qualifications and training:* Skills are needed in business management, marketing and customer care, amongst others. Yet, many people in rural areas are usually insufficiently trained to be able to respond to the challenges of tourism or to take on qualified jobs. In addition, tourism professionals are too infrequently used.

*Public sector support*

- *Lack of support from other sectors:* Public sector support is particularly important in ensuring there is an infrastructure in place for the influx of tourists (signposts, roads ...) and a favourable climate for encouraging small business enterprises. Lack of resources and political will amongst local authorities makes it very diffi-

cult to initiate sustainable tourism development. The tourist business also relies heavily on the cooperation and participation of other sectors, for instance through services or base materials, or through access to the natural or cultural heritage on private land.

- *A lack of sufficient potential tourist attractions:* In order to be able to draw in sufficient tourists to make tourism economically viable there needs to be a critical mass of current and potential products available. These also need to be sufficiently attractive and distinctive to create the necessary competitive edge. Without this, tourism is likely to be short-lived and unprofitable.
- *Seasonality:* Tourism in Europe tends to be a very seasonal activity, this results in poor working conditions with negative effects on quality of service and business competitiveness. According to the Federation Nationale des Gites Ruraux in France, their gites are occupied for just 15 weeks a year - this gives them an annual occupancy rate of just 20%. As a consequence, it could take some time to pay off an initial investment and to start making a profit. It also means that the new jobs on offer, because of their seasonal nature and sometimes long working hours, may not be enough to attract sufficient or qualified staff, particularly amongst the younger population.
- *Lack of control over outside influences:* Tourism is an image industry and therefore very sensitive to the macro-environmental and social conditions and forces outside the direct control of the local tourism businesses - this makes the tourism business vulnerable to changing fashions and trends and to negative impacts.
- *Potential social conflicts:* A significant influx of tourists may cause over-crowding and congestion, disrupt the delicate social fabric of the area and provoke a clash of cultures. It can also lead to inflationary land and real estate prices and goods.



- *Damage to natural and cultural heritage:* Most natural areas are fragile and can easily be damaged. This puts a limit on the number of visitors who can access the site. If it is too high it will end up destroying the very thing that attracts them. Heavily used paths are eroded, habitats are damaged. Irresponsible behaviour can also start accidental fires, disturb wildlife..... Poorly conceived infrastructure around the site can cause further damage and lead to serious pollution problems if not enough attention is paid to treatment of waste, etc.. Cultural heritage may also suffer, especially if it is of the immaterial kind. There is a real risk that traditions and lifestyles become trivialised and over-commercialised which will destroy their authenticity and value.



*Fragile  
cultural  
and natural  
heritage*

### 4.3 Particular issues for tourism based on heritage

The above lists the classic opportunities and risks associated with any form of new tourism development in rural areas. There are, however, a number of additional factors that should be borne in mind when dealing with natural and cultural heritage.

- *Cultural and the environmental heritage cannot be produced:* They exist because of history and geography and cannot be created easily in the short term. This means that destinations need to work with what they have. If their intrinsic appeal is low or only moderate it will be very difficult for the area to gain a competitive edge over other destinations.
- *Cultural and natural attractions are mostly a public resource:* Tourists rarely have to pay to see nature and most of culture – e.g. to visit nature reserves, landscapes, village architecture.... It is therefore mostly the private businesses, who develop a derived product around this public resource, that reap the economic rewards. But there is no automatic mechanism for ensuring that some of this income is put back into maintaining and enhancing the cultural and natural heritage itself. This applies even at the level of the local authority. The additional tax revenues generated from successful tourism are not usually allocated, as a priority, to preserving the cultural or heritage resources.
- *Damage to natural and cultural resources are extremely difficult to measure:* Tourism inevitably impacts on the natural and cultural resources of a particular destination but its interrelationship is extremely complex and very difficult to quantify. There is no universal formula for determining carrying capacities for sites (i.e. the number of people that can visit the site without causing significant damage to it) as so much depends on the particular circumstances of the area. A number of institutions, e.g. the World Tourism Organisation, European Environment Agency and others, have started to develop indicators of sustainability, but these are also still in their infancy. As a result, even if there was a way to internalise the costs of protecting and maintaining this resource it will be very difficult to decide on how much should be allocated to it. If it is already difficult to assess damage, it will be even trickier to determine the cost of this damage or to mitigate against potential damage in the development phase.
- Finally, *the pricing structure* of heritage-based tourism is not as clear as in other services or other forms of tourism. There is little guidance available in this area due to the lack of established benchmarks. Comparable attractions in other regions might exist but in a different economic climate which makes comparisons difficult. Consequently, businesses might be pricing themselves out of the market, or more likely undercharging.

Tourism  
revenues  
and  
heritage  
conservation

# 5. Key success factors

## 5.1 Designing a tourism offer

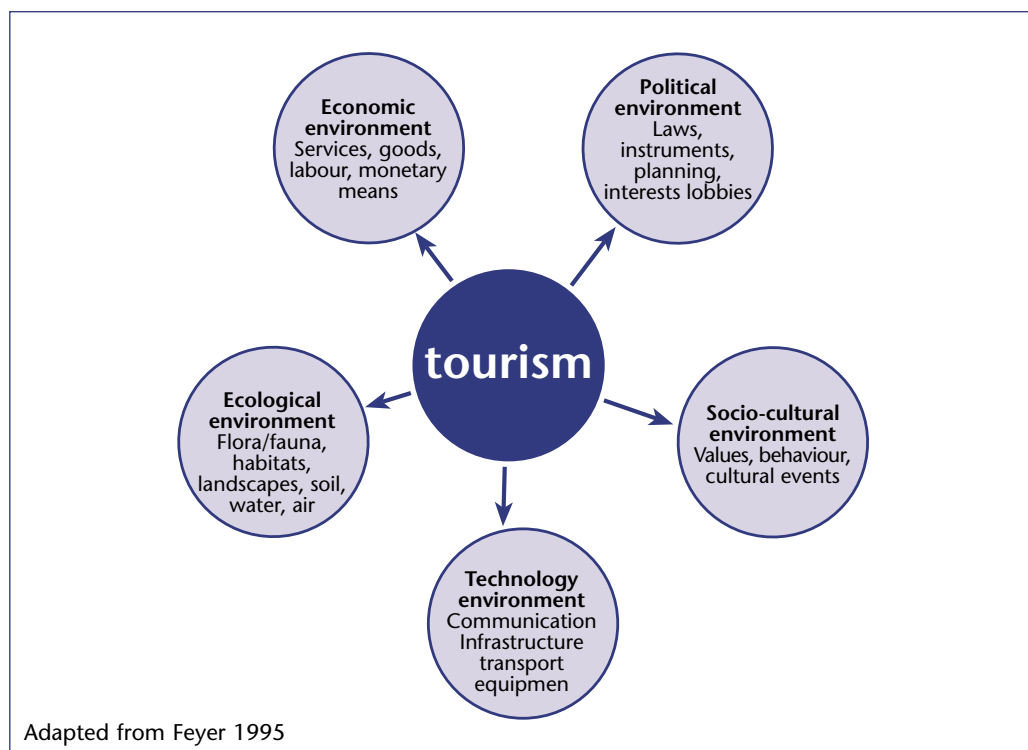
Unlike other businesses, there are few barriers to entry into the heritage-based tourism market. Anyone can attempt to gain access by offering some part of their history or their land to tourists. This means that the offer is often very dissipated and not always directly linked to tourism demand. Already, in the cultural heritage market, supply is growing far faster than the numbers of interested tourists. There is consequently a real chance of failure, even in this ever-expanding sector, if all aspects of the development process are not carefully considered.

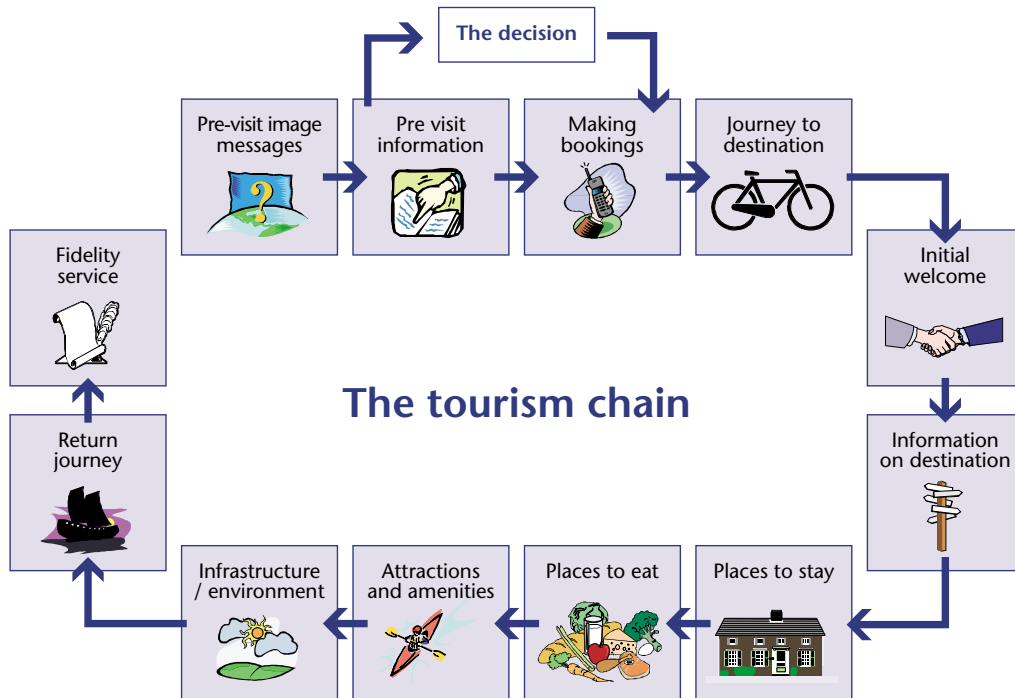
*Tourism requires an integrated approach*

Chapters 6-9 will provide best practice guidance on how to develop this form of tourism in a sustainable manner. But first, it is worth looking at some of the main success factors that crop up amongst the recent initiatives involved in non-traditional tourist destinations based on natural and cultural heritage.

### The nuts and bolts of a tourism product

Tourism consists of a complex system of activities and services which have numerous inter-relationships with other economic, environmental and social sectors. Developing sustainable tourism pre-supposes an understanding of the complexity and characteristics of this tourism system.





Tourism also operates in several different physical places, starting with the place where the potential customer lives (which may be in a different country) and ending with the tourist returning home. Just building a hotel or a nature trail and waiting for people to turn up will not be enough. Developing a tourism product involves not only producing a facility, or delivering a service, but also planning, conceptualising, branding and packaging this product. Thus, the entire service chain of a journey needs to be considered, from making the customer aware of the product in the first place, to ensuring satisfaction during the holiday, and encouraging them to return or to tell others about their positive experiences.

#### The key ingredients of a sustainable tourism product are:

1. Original offerings:
  - Natural attractions (landscape, climate, water, wildlife, ...)
  - Cultural attractions (both material and immaterial)
2. Derived offerings (required to make the attractions available for tourism use)
  - Holiday facilities (accommodation, food, shops, entertainment, events, etc.)
  - Mediating facilities (tourist information offices, tour operators, internet services)
3. Market research
  - To identify who the potential customers are and what they want
  - To find out the right market segments
4. A marketing strategy
  - To inform about the product/destination
  - To make people want to come
5. Service delivery
  - Provision of facilities, services and information
  - Maintenance of the above
  - Customer satisfaction
  - Adequate infrastructure and supporting services
6. Pricing policy
  - Setting a competitive price
  - Ensuring sufficient profitability to repay investments

## 5.2 The 'art' of tourism

Making this chain of events workable and viable for the whole destination over the long term means basing it on the following three fundamental premises:

- *Agreement*: Tourism relies heavily on a wide range of services and activities. It is therefore especially important in non-traditional tourist destinations to forge partnerships and encourage participation from all concerned, whether public, private, or local inhabitants.
- *Resourcefulness*: Tourism is a market-led industry. As a result, businesses must find imaginative ways to tap into this market to ensure that they have a viable economic product. These products do not only have to be original enough to give the area a distinctiveness, but they must be packaged in a user-friendly way so as to be able to reach the intended customer.
- *Tempered actions*: It is all a question of balance: supply must not exceed demand, the price should be right for the customer and for the investment made and the products should be attractive and diverse enough to ensure visitor satisfaction. The natural and cultural heritage on which tourism is developed, should not only be safeguarded, but also lead to an increased awareness of their value and conservation needs. Finally, the local population should be able to enjoy the benefits of tourism through improved living standards and positive cultural exchanges. Tourism development must therefore be founded on the three pillars of sustainability (economic, environmental, social) and the actions must be tempered in such a way as to be able to share the benefits equitably.

*Tourism is based on three fundamental principles*

## 5.3 Ten key success factors

The following success factors have been identified from a wide range of practical examples of tourism based on natural and cultural heritage in non-traditional areas, and from the case studies in annex in particular. They are not exhaustive, nor are they relevant in every case, but hopefully they will provide a source of inspiration for those wishing to be involved in this type of tourism.

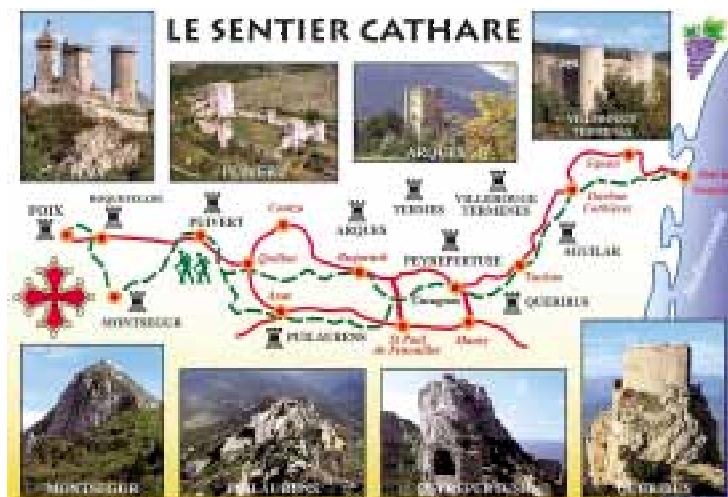
*Significant heritage features are like beacons*

1. *Significance*: The importance of the cultural or natural heritage is a decisive factor. There is little merit in developing an area that has only moderate and few heritage values. It can still be done, but it will be much harder to turn it into a sustainable product. Having a significant feature, on the other hand, is a major asset as it acts as a beacon for the area. The Oulanka National Park in Kuusamo is well known throughout Finland, and has the capacity to draw tourists to the area even though they may never visit the park. This is because it is a symbol of pristine nature and spectacular scenery.
2. *Distinctiveness*: This is different from significance in that it refers to all that makes one particular area distinct from another, giving it a unique selling position. All elements of the tourism chain can contribute: carefully targeted market segments, quality products and ser-



vice, authenticity in the attraction, a strong local identity... The Eichsfeld used its distinctiveness - as a Catholic enclave in a Lutheran part of Germany - to attract tourism from the neighbouring Länder. The cultural and natural heritage is interesting, but not spectacular, yet, thanks to this distinctiveness aspect they were able to develop an attractive tourism package anyway.

3. *Clustering*: Natural and cultural heritage can often be scattered. One site on its own is unlikely to be of much interest, but if they can be pooled together with others, they may collectively provide enough interest to attract a critical mass of tourists. This can be done by clustering or developing itineraries. Both approaches were used with great success in Extremadura, several thematic routes were devised including a gastronomic route, a historical route, an artists route, week-end routes, ...



Sometimes clustering is not enough though, the destination needs a major attraction - or growth pole - which can then be accompanied by a series of smaller additional attractions. Shannon Development did this by creating seven major professionally run tourist attractions (e.g. a model medieval village and music festival auditorium). Around each of these it encouraged local private initiatives to develop additional products so that the tourists would be encouraged to stay longer. The same was done in

Pays Cathare, where 11 ruins were developed as attractions and combined in a circuit. At each one, additional attractions were also created to encourage tourists to visit the nearby villages.

4. *Branding and Networking*: Having the right tourism products is only part of the equation, potential tourists also have to be persuaded to use them. Branding is a way to encourage the customer to buy a particular 'product' by creating an image around it. This works for tourism too. The Pays Cathare developed a quality label for a range of products from tourist attractions, restaurants, crafts, guides, ... Because it was applied to many sectors it has helped to create an image of the area as a whole - that of quality.

*Networking with similar attractions is an effective marketing tool*

Networking is another way of building up a reputation. The World Wide Fund for Nature (WWF), for instance, is in the process of developing a 'Pan Parks' label for national parks across Europe. Each park must adhere to a strict set of principles for conserving its natural assets and developing a quality tourism product. With time, the label will come to stand for high quality tourism in unique natural environments. Any park that adopts it should therefore find it easier to market itself. Individual hotels and other tourist facilities can also profit by associating themselves with national or European networks. For instance, the 'Europe of Traditions', described earlier, regroups vernacular houses offering a high standard of accommodation and hospitality. Any house that joins this network will also have the benefit of an existing marketing route and an established reputation.





5. *Access:* The weather and distance to the destination are deciding factors for many tourists when choosing a destination. Pays Cathare (in France) and Eichsfeld (in Germany) both use their proximity to major towns and traditional tourist destinations to draw in visitors. This works particularly well for regional and local markets. The more remote an area and the more extreme the weather, the harder it is generally to attract tourists. Particular attention needs to be paid, in these areas, to choosing the market well. Kuusamo, in Northern Finland, for instance, is difficult to get to, but it is this very remoteness and the extremes in weather that has become its selling point. Small guided packages have been developed to give people a sense of adventure whilst still assuring their security – for instance, organising skidoo trips in the middle of winter to the Russian border. These small adventure tours are popular for businesses and make good money.



6. *Seasonality;* Is often a major problem for the tourism industry, but in the case of heritage-based tourism it should be viewed as an opportunity to overcome it. As people take shorter and more frequent holidays and the population gets older, tourists will be encouraged to explore new areas both in and out of season. Natural and cultural heritage, in particular, attracts markets that are not so weather dependent. Kuusamo holds special events in September and May to prolong the summer and winter seasons. These involve, for instance, high profile events such as a bird marathon (competitive birdwatching) or a national fishing contest. Shannon Development uses discount promotions, particularly coupons in newspapers, to encourage off-peak tourism. But the best value lies in offering more for the same price; this can make off-season tourism particularly attractive.

*Overcoming seasonality is an opportunity for rural heritage based tourism*

7. *Partnership:* The motivation factor behind the development of sustainable tourism is particularly important for non-traditional tourist destinations. Often development starts thanks to the initiative of one particular body, whether public, private or an organisation, interested in the conservation of the natural or cultural heritage. After the reunification of Germany, the Eichsfeld, which had been split by internal partitioning, benefited greatly by the enthusiasm and commitment of civic leaders in towns located on either side of the former border. They started their own initiatives and began the process of cooperation through an established tourist association that has proven to be highly effective.

8. *Strategic planning:* Developing an overall tourism strategy involving all key players is an essential tool for developing a successful and sustainable tourism product. Shannon Development adopted a twin track approach: consultations with local residents through its network of regional offices, and product development based on market research. It avoided the dilution of public resources into too many small projects and concentrated instead on



agreed initiatives that made up a coherent programme. Once the development phase was over Shannon Development succeeded in maintaining the dynamism of the area, through careful monitoring and re-assessments, which ensured that the tourists kept on coming. The Pays Cathare adopted a similar approach, the public authority established a clear strategy for tourism development, but at the same time, encouraged local projects from local people. This bottom up approach was made possible by deploying a number of development agents in the villages.

*Interpretation is important for awareness raising and enhancing visitor experience*

9. *Accessibility:* This is distinct from access, as it is about presenting the natural and cultural heritage of the area in an understandable and enjoyable way so that the tourists will be able to learn from them. If this is not done properly the tourist is unlikely to recommend the area to anyone else and be sensitive to the needs of these fragile resources. In Extremadura, the National Park of Monfragüe developed an interactive exhibition on the typical habitat, the dehesa, which calls on almost all the senses: touch, smell, hearing, sight, ... As such it appeals to children and adults alike – and gets the conservation message across in an enjoyable way.



In Pays Cathare, each of the 11 ruins on the tourist circuit have certain elements in common. The tickets and brochures are all produced in the same format and provide the same kind of well-researched information for each site. But each ruin also works with a particular theme or attraction that is unique to it, for instance an interactive video on the lives of Cathare people, the history of the gold mine industry in Aude....

10. *Sustainability:* Finally, conserving natural and cultural heritage is fundamental to sustainable tourism. In Kuusamo, the national park authorities are currently negotiating a series of agreements with service providers who are willing to abide by a strict code of environmental conduct. In exchange they will be allowed to use the park logo, advertise in the visitor centre and have the benefit of the park services. Part of the code of conduct requires the service providers to undergo training on nature conservation so that this message is then passed onto the tourists.

*Tourism can help to fund heritage conservation*

The national park is also considering developing opportunities for tourists to participate in conservation actions in the park, e.g. mowing fields, restoring

wetlands, replanting trees, removing scrub.... Their research shows that there is a small potential market for this. It is worth exploring as everyone stands to win, the Park gets free assistance for its conservation actions, the service providers have a ready market to tap into without much investment (just a bed and food) and the tourists get a sense of satisfaction for having contributed to nature conservation.



# 6. Assessing tourism potential

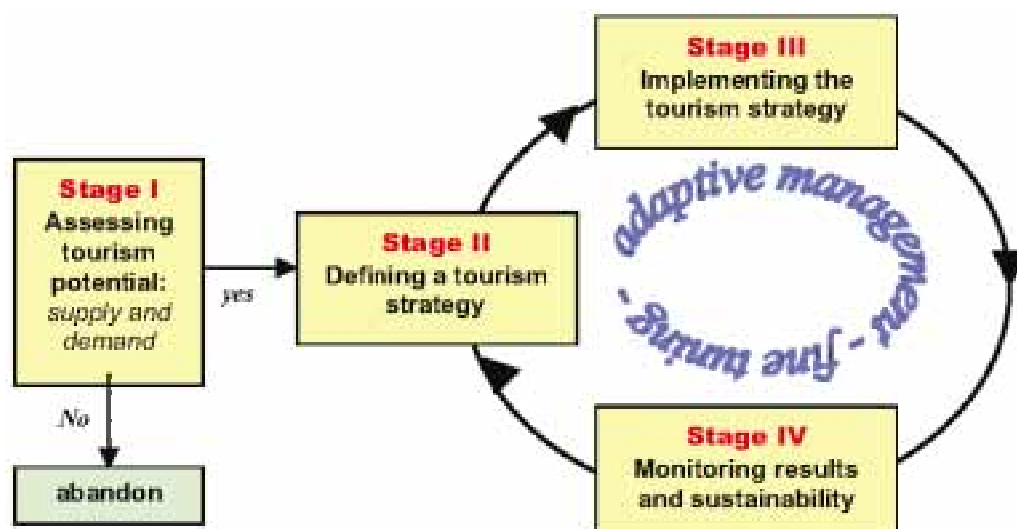
## 6.1 Best practice guidance

The previous chapters illustrated some of the complexities involved in developing sustainable tourism based on natural and cultural heritage. A planned approach will ensure that these complexities are taken sufficiently into account and that the ensuing actions are not dissipated or ill conceived. If all stakeholders work together to determine what exactly they want out of tourism and how they want to package this, everybody stands to gain. If they don't, they will soon run into a barrage of obstacles. At best, the result is a considerably weakened product. At worst, it simply does not get off the ground and all financial investments are lost.

This point cannot be stressed enough. There are many examples of expensive failures, projects that could have been viable had they paid more attention to certain basic considerations. Common causes include: lack of consideration of the need for an infrastructure to support the product, an over-estimation of the tourism potential leading to more supply than demand, lack of market research to determine who would be interested in this type of tourism, conflicts, and lack of cooperation with other sectors....

*A well organised approach is best*

The next four chapters outline the elements that should be considered when developing a tourism product using natural and cultural heritage and make a series of recommendations as to how this can be done, based on best practice experience. It follows the logical stages illustrated below, starting with an assessment of the area's tourism potential.



## 6.2 Principles of tourism supply and demand

*Situation analysis*

The first question to answer is whether tourism is actually worth developing. To be able to assess this, information should be gathered on a wide range of aspects relating to tourism supply (potential heritage sites, business structure, infrastructure, ...) and tourism demand (potential markets, visitor target groups, ...) This is often referred to as a situation analysis.

This process is an iterative one: the information obtained through the situation analysis will not only serve as a basis for determining whether to go ahead with tourism but also for defining how it should be done. Thus, it will be useful to come back to this initial analysis throughout the development process either to complete the information or to try out various development scenarios.

*Who starts the ball rolling*

Much will depend on the local circumstances as to who initiates this process. It could be a protected area authority or an environmental/cultural NGO who wants to win support from the local community, a local authority seeking ways to diversify the local economy, or private entrepreneurs who see a market opportunity. Whoever takes the initiative though, should dialogue with other interest groups as early as possible. The situation analysis provides an ideal vehicle for this. It gathers the views of all those likely to be implicated in tourism development and provides a mechanism for reaching a consensus on how to proceed.

At this stage, it is also very helpful to involve tourism professionals in the exercise. They not only have the expertise needed to do the benchmarking studies and market analyses, but can also provide an independent view of whether the area has tourism potential and, if so, how it might be developed to gain a competitive edge over other destinations.

## 6.3 Tourism supply

### a. Natural and cultural heritage

#### ■ *Inventory*

As natural and cultural heritage is the basis for developing sustainable tourism, it is logical to start with as broad an inventory as possible of these features. This should be done over a geographically or socially distinguishable area and not necessarily according to administrative boundaries. Existing sources of information are a good starting point, especially for protected features such as monuments or nature reserves, but are often not very comprehensive, so additional fieldwork may be required. In addition to highlighting new interests, this will also allow the physical state of the different features to be determined which will, in turn, help to gauge the level of investment needed to make them accessible for tourists.

Once the different sites have been surveyed, the area as a whole should be considered in terms of its overall attractiveness, scenic value and 'character'. Also, its location in relation to major cities, airports and other tourist destinations should be recorded, together with local weather patterns as both influence visitor patterns and seasonality.

Situation analysis for determining tourism potential		
QUANTIFICATION	ASSESSMENT	
	capacity	vulnerability
<p><b>Natural features</b></p> <ul style="list-style-type: none"> <li>■ <i>Characteristic and attractive landscapes</i></li> <li>■ <i>Flagship species or habitats (e.g. bears, bogs)</i></li> <li>■ <i>Other interesting, unusual or representative wildlife</i></li> <li>■ <i>Diversity of ecosystems</i></li> <li>■ <i>Geological features such as lakes, rivers, cliffs</i></li> <li>■ <i>Protected areas: nature reserves, national parks, ...</i></li> </ul> <p><b>Cultural features</b></p> <ul style="list-style-type: none"> <li>■ <i>Built heritage (monuments, ruins, castles, churches, etc...)</i></li> <li>■ <i>Small heritage features (fountains, chapels, walls, etc...)</i></li> <li>■ <i>Vernacular buildings</i></li> <li>■ <i>Heritage objects (tools, clothes, furniture, tapestries, ...)</i></li> <li>■ <i>Traditions (skills, know-how, customs, ...)</i></li> <li>■ <i>Gastronomy (local products, recipes, production methods, ...)</i></li> <li>■ <i>Events and festivals</i></li> </ul> <p><b>Area as a whole</b></p> <ul style="list-style-type: none"> <li>■ <i>Surrounding landscape</i></li> <li>■ <i>Main land uses</i></li> <li>■ <i>Location and land tenure re potential attractions</i></li> <li>■ <i>Climate</i></li> <li>■ <i>Stakeholders (who, views, capacity)</i></li> <li>■ <i>Public bodies</i></li> <li>■ <i>Interest groups</i></li> <li>■ <i>Tourism businesses</i></li> <li>■ <i>Land owners and other economic sectors</i></li> <li>■ <i>Local residents</i></li> </ul> <p><b>Infrastructure</b></p> <ul style="list-style-type: none"> <li>■ <i>Accommodation, restaurants, existing attractions</i></li> <li>■ <i>Access and proximity to cities, airports, other destinations</i></li> <li>■ <i>Transportation within destination</i></li> <li>■ <i>Other facilities and services (shops, etc. ...)</i></li> <li>■ <i>Current channels of information and marketing</i></li> <li>■ <i>Legal and policy context</i></li> <li>■ <i>National or local tourism strategy and NTA priorities</i></li> <li>■ <i>Legislation relating to SMEs</i></li> <li>■ <i>Policy priorities</i></li> <li>■ <i>Planning laws and zoning according to economic interests</i></li> <li>■ <i>Environmental legislation</i></li> <li>■ <i>Tourism demand</i></li> <li>■ <i>Use of existing resources</i></li> <li>■ <i>Market segment surveys</i></li> <li>■ <i>Benchmarking competing destinations</i></li> </ul>		

### ■ *Assessing tourism potential*

Once the survey work is complete, a first assessment can be made of the different features to determine whether they have:

*Level of interest for tourism*

- strong tourism interest, strong enough to incite people to come to the area;
- moderate tourism interest, which can complement the primary attractions and diversify the offer;
- little or no tourism interest.

At this stage, it is useful to make comparisons with similar destinations within the region to see if there is something special about this area. The best way to gather this information is through a benchmarking study. Not only will this analyse the tourism attractions already on offer elsewhere and their levels of success, but it will also identify the types of attractions that are currently under-represented. This, in turn, will help to choose the right mix of tourism products to give this particular area its competitive edge.

### ■ *Vulnerability and potential carrying capacity*

Finally, having identified the heritage features of potential tourism interest, their vulnerability to human pressures should be considered. Tourism based on natural and cultural heritage will, by its very nature, be more intrusive than other forms of tourism even if the number of tourists remain small. That is why it is especially important to assess vulnerability at the outset so that the final products can be developed in a sustainable manner. The ultimate paradox would be for tourism to end up destroying the very thing that attracts it to the area in the first place.

*Assessing carrying capacity*

If, as may sometimes be the case for rare or fragile features, no form of tourism can be supported then conservation must come first and efforts should be put into their preservation instead. Whilst this means there is one less site available for tourism, such a strong statement could in fact help to reinforce the image of the destination as one that attaches particular value to its heritage.

More often though, the vulnerability of a heritage feature means that the number of tourists should be limited rather than stopped altogether. The level of visitor use an area can accommodate with high levels of satisfaction and little impact is known as its carrying capacity. This is notoriously difficult to assess as it operates on several levels: environmental, social and even psychological and involves a wide range of different factors such as frequency and density of use.



Nevertheless, an attempt must be made to estimate carrying capacities of the different sites as this will have a significant influence on the type of attractions that can be developed, the number of tourists that an area can accommodate, and consequently how the overall package will be marketed ( chapter 7).



## b. The stakeholders

Once an overview of the area has emerged, the next step is to identify all relevant stakeholders and to obtain their views on developing sustainable tourism in the area. This may seem like a laborious task, but it will pay dividends in the end. Not only will it help to identify, at the outset, the potential pitfalls and conflicts which can then be directly addressed as part of the development process, but it could also provide a wealth of ideas and suggestions on what to develop and where.

The process of consultation itself might also be a way to ignite enthusiasm. Often there is an initial degree of apathy towards new ideas, especially in rural or remote areas, sometimes it is so strong that it kills the initiative, but mostly it is because people do not feel involved in the process. Giving the stakeholders an opportunity to voice their views, to hear the views of others and to participate in the decision-making process, is the surest way to develop an innovative and dynamic approach to tourism development.

*Obtaining views of stakeholders*

### ■ Identification of stakeholders

There are generally five main categories of stakeholders:

- **Public authorities and other similar bodies:** are responsible for the facilities, services and infrastructure that will support the tourism products (e.g. roads, post office, signposts...) and often they own the natural and cultural heritage sites. They are also responsible for legislation and funding relevant to tourism development such as taxes, business incentives, environmental laws, planning restrictions.... Finally, they are in charge of the area's overall land use policies, be it in agriculture, town planning, or tourism.... As such, they are a vital component of any tourism development initiative and often the most appropriate to initiate and steer the development process. Later on they can also help to fund, coordinate and promote the tourism product to the outside world.
- **Nature or culture interest groups:** Often these are the very groups who have the idea of developing sustainable tourism in the first place, because they are interested in saving the area's natural and cultural heritage, but they realise that in order to do so it is sometimes necessary to demonstrate their economic value to the area. These bodies, even if they are amateur groups, have a wealth of knowledge about the cultural/natural sites and will therefore be instrumental in providing expertise for the design and interpretation of future tourism attractions. They can also act as a kind of watchdog to ensure that the nature and culture do not suffer as a result of tourism development, but instead benefits through added protection and maintenance.
- **Tourism enterprises:** These include hoteliers and other accommodation providers, restaurant owners, tour and travel service providers, owners or managers of tourist attractions and other tourist facilities or services. These enterprises are, and will continue to be, the backbone of the tourism sector. They are the ones who make the financial investments, who run the different tourist services and who are most in contact with the tourists themselves.

*SMEs are the backbone of tourism*

If there is already some tourism in the area, these businesses will be best placed to comment on current tourist trends, expectations and levels of satisfaction and to propose ideas for improvements and additional attractions. If there is no tourism as yet, then an analysis of the private sector will help to determine whether there is a climate for setting up tourism related SMEs, e.g. number of existing SMEs, entrepreneurship, start up investments, bankruptcy rates, levels of inter business cooperation....

- **Other related businesses and land users:** This covers a broad cross section of stakeholders, from individuals who own a piece of land of potential tourism interest, to representatives of other economic sectors such as agriculture, forestry, fisheries, industrial sites, extraction companies, etc. who shape the area's economy and land use. These groups have an interest in tourism development, either because they fear it may conflict with their current practices, or because it could provide them with additional opportunities for income generation or economic diversification.

*Local  
opinion  
matters*

- **Local residents:** Finally, attention must also be paid to the local community. They are the prime source of employees and entrepreneurs for new tourism businesses and have to live with tourism. In this context, it is useful to record the total population of the destination, the inhabitants per km<sup>2</sup>, its demographic structure (age, sex..), main employment sectors, and the current unemployment rate. The locals are also the ones who give the area its distinctive character and sense of identity and who will at some stage come into contact with the tourists, even if they are not directly involved in the industry. If their views are hostile to the idea of tourists coming to the area, this will affect the 'atmosphere' of the place. They may, for instance, fear that an influx of tourists, could disrupt their use of the natural resources (e.g. hunting and fishing rights) or push up prices. Being sensitive to their needs and concerns will help to win general support for tourism development.

■ *Assessment of their views and potential capacity*

For each one of these stakeholder groups the following should be assessed:

- level of interest in developing sustainable tourism in the area and expectations,
- principle concerns and fears,
- capacity to get involved (financial, human resources, organisational),
- levels of skills and qualifications in tourism and business management.



This can be obtained through interviews, questionnaires, and/or regular exploratory meetings with the different stakeholders. Once the information is collected it will be possible to determine where the main obstacles to tourism development lie and what will be required to overcome them.

It may be that they are so great that the initiative cannot be pursued further, even though the area has a wealth of cultural and natural assets to exploit. Under these circumstances, it is best not to force tourism on the local stakeholders. Without their general support it will be very hard and expensive to develop a viable product.

### c. The existing infrastructure

#### ■ Quantification

The third element to assess in the situation analysis is the existing tourist infrastructure. If there is no tourism in the area at present the first four items are probably not relevant, but the last two should, in any case, be assessed:

- **Accommodation:** Type of accommodation available in the area (camp sites, hotels, rented cottages ...), their capacity (n° bed places), location, standard (two star, luxury), pricing and, if it exists, occupancy rates and customer satisfaction surveys.
- **Restaurants:** As for above. In addition, it would be useful to record what kind of food they serve, particularly whether it is locally produced or bought in.
- **Existing attractions:** The type of attractions currently available, location, number of tourists attending, pricing, level of interpretation and visitor satisfaction.
- **Existing marketing channels:** Finally, how is tourism currently being promoted, what communication channels are being used, who is doing this, what sort of information is available on the area in general and on its facilities, attractions and interests in particular?
- **Transportation:** The relative ease of access to the area by air, rail, or road, the cost and time involved in getting there. Once in the area, is there an adequate road network, has it been signposted, is it in good condition, are there parking areas, is there traffic congestion ....is there a public transport network, what are its routes and schedules and how efficient is it?
- **Other facilities and services:** What are the other facilities available in the area, ranging from shops, medical facilities, post offices, banks to walking and hiking routes, local sports facilities, swimming pool, riding centres, and adequate water/electricity supplies..... All these are important for the tourists themselves and for developing future tourist infrastructures.

*Tourism  
needs a  
supporting  
structure*

#### ■ Assessment

Once again, having recorded the above information, it will be important to assess this in function of its present and potential capacity to contribute to the development of the site as a tourism destination. It will also help to gauge how much financial investment will be required to ensure that the tourism products are well supported.

*..and  
appropriate  
legislation*

### d. Existing legislation and policy priorities

Finally, existing laws and regulations will affect not only the development of tourism in the area, but also its maintenance over the long-term. If the laws are incompatible or over-bureaucratic they can be a major handicap or disincentive for the emerging tourism sector. The political climate is equally important. The lack of political will or policy at local or regional level to support tourism development, based on sustainability and use of natural and cultural heritage, will seriously affect the area's ability to develop this form of tourism, not least because of the lack of potential funding support.

The following should be given particular consideration:

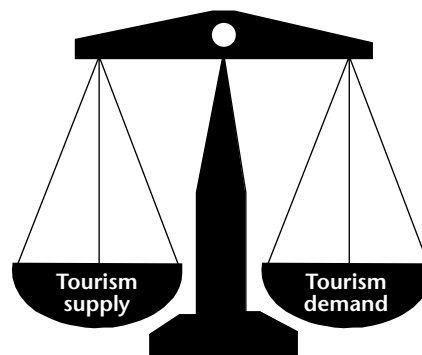
- **Existing national and regional tourism strategies:** If an existing tourism strategy or policy exists at national, regional or local level, this should be examined in detail. Just as it is important not to operate in isolation at the local level, it is also important to be aware of what is happening at a regional, national, or international level. If all rural destinations decided to launch themselves into heritage based tourism, the market will be rapidly saturated. It is vital therefore to look at what is happening elsewhere, what regional and national policies for tourism exist, what the role of the national tourist administrations is (local tourist offices...), if they have any recommendations for the area in question? Tourism administrations are ideally placed to provide guidance and professional expertise on current market trends and policies and later to help promote the destination. Their views and assistance should therefore be sought at the outset.
- **Policy towards SMEs:** and tourism SMEs in particular, should also be examined. For instance, are there any small business incentives or support services (e.g. training programmes) to encourage SMEs, or are there many regulations and certification procedures requiring a heavy administrative input? This will influence whether people are willing to launch themselves into the tourism business and whether they can sustain themselves. If all other components are right but the business sector is over regulated or disadvantaged, the tourism products will suffer as will the necessary dynamism of whole process.
- **Planning and zoning laws:** Planning laws will influence the type of tourism attraction that can be built and the ease with which this can be done. It will also influence the overall 'image' of the place. Also important to know is whether the overall zoning plan for the area restricts developments to certain areas or if it is 'free for all'. If considerable effort is put into creating quality tourist attractions it must then be supported by a sensitive development policy. Allowing eyesores, major constructions, or incompatible land uses will damage the tourism base and probably destroy it in the long run.
- Finally, legislation relating to the **environment** should be assessed to know whether it provides a high level of protection for the natural and cultural resources, and whether it is being adequately implemented. If tourism is to develop in the area it is essential that there are sufficient legal safeguards for the natural and cultural environment to prevent abuses and an overall degradation of the resource. Strong legislation can also be used as a selling point for the area.

*National  
tourism  
priorities*

*Compatible  
land use  
policies*

## 6.4 Tourism demand

So far, only the supply side has been assessed, but there is also the need to determine whether there is a market for these products, and what that might be, before deciding whether to develop tourism in the area. As chapter 3 illustrated, relatively little information exists generally on typical visitor profiles, market influences or market potentials for the different nature and culture related market segments.



There is therefore little choice but to carry out one's own market research and benchmarking studies. Whilst this requires an initial financial investment, it is well worth the money. The advantage is that the results will be much more targeted and relevant to the area concerned. In this respect, it is strongly recommended to seek the assistance of tourism professionals to do the market research. Not only are they very familiar with the tourism business but they also have wider experience of current market trends and of potential competing destinations.



### ■ Looking for potential markets

There are two possible approaches to defining target user groups: one is to look at what the region has to offer in terms of attractions then to search for appropriate markets to tap into. The alternative is to assess which particular types of tourism activity are showing strong growth potential, or are under-represented in the region, and then to adapt the products accordingly. In practice, a combination of both approaches is best.

*Market research helps determine the target audience*

Starting with a potential list of tourism attractions derived from the assessment of tourism supply, a first estimate can be made of who is likely to be attracted to these features (e.g. using some of the findings of chapter 2 regarding typical visitor profiles, motivations and interests). This will provide an orientation for the market research study. The study will then be able to investigate these different market segments further to determine how many tourists they may be able to attract, from where, for how long.... Ideally, all possible markets should be explored, the more diverse the source of tourists, the more stable the tourism base and the less vulnerable the area will be to future market changes.

Having a ballpark figure of the numbers of tourists that can be drawn from different potential market segments will greatly facilitate the decision making process. If it is too small then alternatives have to be investigated or the idea of developing tourism reconsidered.

*If the market is too small then alternatives must be investigated*

### ■ Assessing current markets

#### Survey of current tourism use and preferences:

- How many tourists are there annually?
- When do they come and how long do they stay?
- Where do they come from and how do they get here?
- Where do they stay and what do they do/visit?
- How much money do they spend locally?
- Who are they (age, sex, size of group, profession, main interests, motivations)?
- What were their expectations?
- What did they particularly like/dislike?
- Have they been before, will they come again?

It may be that there is already some tourism in the area. If this is the case, it is best to start with a survey of existing tourists in order to determine their numbers, interests and concerns. From this, it will be possible to assess whether the existing attractions are being used fully and whether there is a potential market for creating more similar attractions or whether alternative facilities should be offered to diversify/ complement the existing offer.

Some of this information may already be available through local tourism statistics. Otherwise, a visitor survey using interviews or questionnaires over a period of time will provide the most complete answers. If this is too time consuming, interviewing the existing tourism businesses may provide some useful pointers instead.

### ■ *Identifying the image of the area amongst outsiders*

Finally, it can also be useful to find out, amongst those who have never visited the area, what images they have of the place. This can help to determine the kinds of expectations tourists are likely to have if they were to visit or the reasons why they may not be tempted to come. Again, interviews with a small cross section of people from the nearest big town or from a specialised interest group, or even amongst specialised tour operators could prove to be a useful way of gathering this information.

## 6.5 The final assessment

### ■ *A SWOT analysis*

The final stage in the process of determining whether to develop sustainable tourism based on natural and cultural heritage is to look at the totality of the results obtained during the situation analysis.

*A SWOT analysis helps to decide whether to develop tourism*

This is best done using a SWOT analysis which defines the area's

- strengths,
- weaknesses,
- opportunities, and
- threats.

A SWOT analysis simply means summarising and categorising the main pros and cons according to these four headings and presenting the results as a series of short statements in tabular form (see example). 'Strengths' refer to what the area has to offer and 'weaknesses' to what it may be lacking (unique attractions, poor access) whilst the 'opportunities' and 'threats' refer more to the circumstances in which this development might take place.

Once a SWOT analysis has been done, it will become obvious what sort of links there are between the different issues and where the main problems lie. For instance, it can help to:

- decide whether or not it is actually 'worth' developing sustainable tourism using natural and cultural heritage;
- determine whether a different focus is needed, e.g. going for a bigger area because the attractions are too limited or targeting more of the different market segments. This simply means going back to the situation analysis and trying a different tack;
- highlight the issues that need to be addressed in the tourism development process;
- try out different scenarios to maximise the benefits and minimise the negative social and environmental impacts.

*Be realistic about the area's tourism potential*

The bottom line is to be realistic!

### ■ *The participatory approach*

Undertaking this exercise with the main stakeholders is the only way to reach a general consensus on whether or not to develop tourism. If the result is positive, it will also encourage cooperation and partnerships from the outset. Such an exercise can be done, for instance, through an open forum where the results of the situation analysis and SWOT are presented.

The following are some of the issues that may influence the final decision:

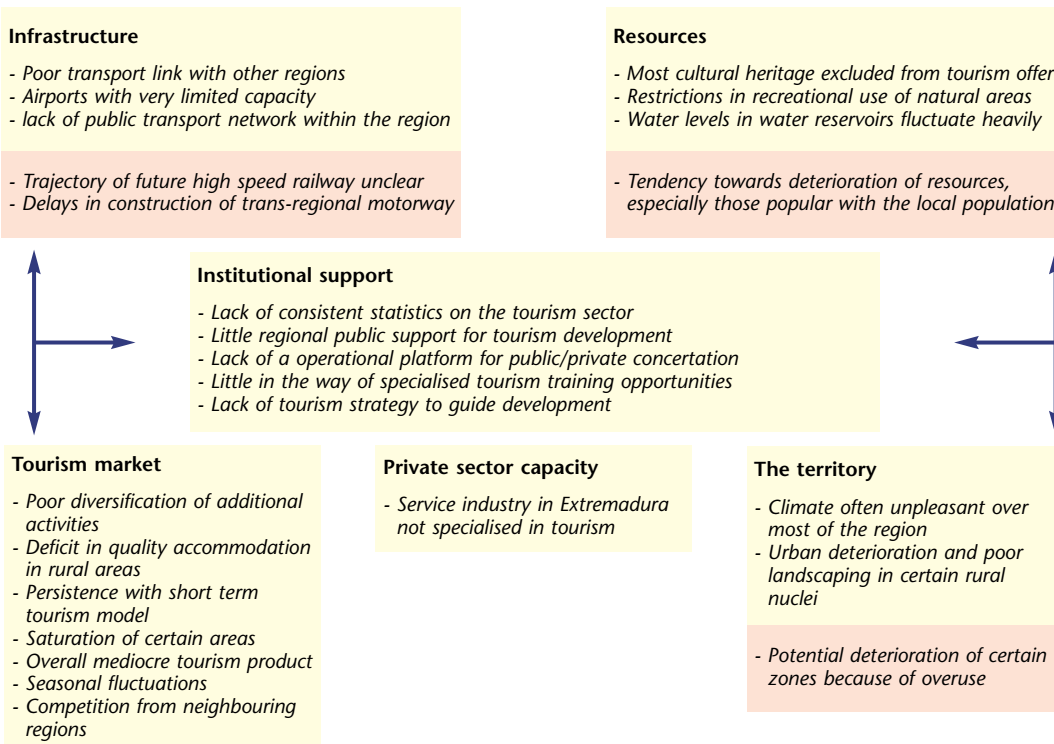
- Does the area have enough of what tourists want? - if not, can the area be enlarged to create a more attractive destination - if yes, is it sufficiently distinctive from its competitors to have a competitive edge?
- Are there clear markets to tap into and enough diversity to avoid over dependence on any one sector? - if not are there other potential sources of tourists that could be explored (e.g. foreign markets) ?
- Will there be sufficient economic gains for tourism SMEs to make the initial investments worthwhile?
- How much investment is likely to be needed to make the destination attractive (e.g. road infrastructure, restoration of historic site, hotels, training ..), are there potential sources of funding available for this?
- Is there a strong backing from local authorities i.e. political support or are there other policy priorities which may conflict with sustainable tourism development?
- Is there a positive climate for cooperation between the main interest groups or is there one sector or other that is strongly opposed - is there any way to realistically win their support?
- Is there sufficient labour force or 'entrepreneurs' to handle the tourism products, are there any tourism professionals to help guide the development process - does there need to be a specific organisational structure in place to create a coherent tourism offer and to spread revenues equitably?
- Is there sufficient awareness and legislation to protect the fragility of the natural and cultural resources to ensure that the tourism is developed sustainably? will these resources be given sufficient protection and are they able to raise awareness for their conservation?

*All stakeholder groups should be involved in the decision*

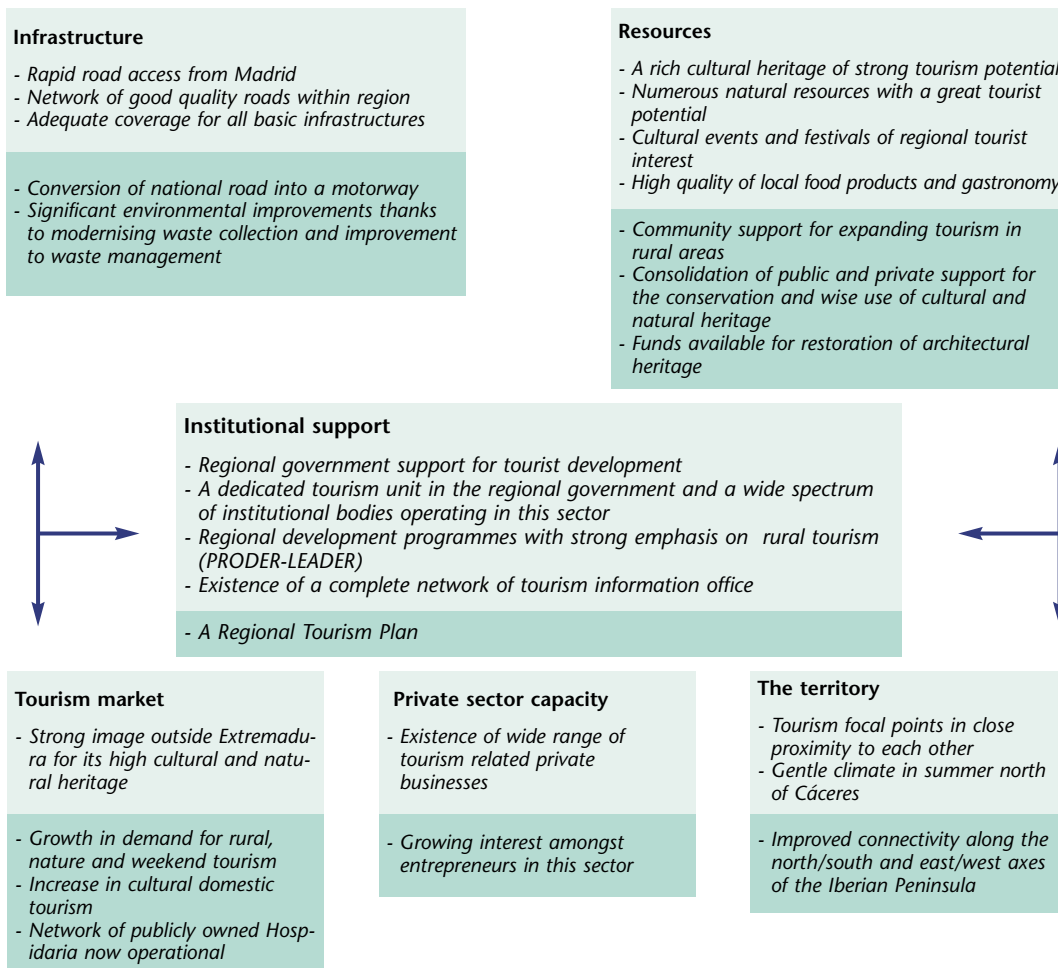
Once these decisions have been considered and discussed, the time will come to decide whether to go ahead with the development of sustainable tourism in the area or whether to abandon the idea. As has been mentioned on a number of occasions previously, it is essential that this decision be based on strong arguments in favour and a realistic understanding of potential constraints. The market is just too competitive and the costs of investment too high to go ahead on the basis of weak or complex arguments.



### Weaknesses / Threats



### Strengths / Opportunities





# 7. Devising a tourism strategy

## 7.1 Why a tourism strategy?

The situation analysis, described in the previous chapter not only helps those involved reach a decision on whether to develop sustainable tourism based on natural and cultural heritage in their area, but also provides them with a wealth of information on how this can be done. Tools like the SWOT analysis make it possible to try out various scenarios in order to find the right combination that maximises benefits, whilst also addressing perceived weaknesses and limiting potentially negative impacts.

The exercise is equally useful for those destinations that already have some form of tourism as it will draw attention to those aspects that need improving or altering and provide a mechanism for assessing general performance. This is especially important for an activity as dynamic as tourism. Market research, SWOT analyses, and regular stocktaking are thus useful at any stage in the development process (even ten years after it has begun).

*Tourism benefits from regular feedback*

Chapter 6 will have illustrated how complex and multi-disciplinary sustainable tourism development and management is in practice. It is therefore very useful to draw up a dedicated tourism strategy for the area to bring these elements together and facilitate the management process. Not only will this encourage the different stakeholders to work together, but it will also help to set priorities, create an integrated product, and generally raise the political profile of tourism. The present chapter explores the different elements that should be included in such a tourism strategy.

## 7.2 Defining an objective and setting targets

### ■ A vision of sustainable tourism

Every strategy ought to have an overall objective for the kind of tourism it wishes to have - who it wants to attract, who is to benefit locally, how it will interact with other economic sectors and with the natural and cultural resources... This should be decided upon through dialogue and consensus with all potential stakeholder groups to ensure that the objective is both realistic and operational.

Clearly, for a destination that intends to use its natural and cultural heritage for tourism development, this should be based on the three pillars of sustainability.



*A tourism strategy provides a focus*

### **Sustainable tourism:**

*(as considered for a European Agenda 21)*

#### **Economic sustainability:**

- Competitive enterprises and tourism
- Availability of workforce and production resources needed
- Economic cohesion and wealth
- High yield/revenue

#### **Environmental sustainability:**

- Environmentally friendly production and consumption patterns along the whole tourism chain
- Sustainable management and conservation of the natural resource base for tourism installation and activities

#### **Social and ethical sustainability:**

- Job supply (number, quality, inclusion and equal opportunities)
- Social cohesion and social justice
- Tourism for all
- Quality tourism; value for money and respect of tourists' interests
- Contribution to the development of humanity (peace, knowledge and education)
- Respect and ethical behaviour regarding the population and individuals confronted with tourism

*Brussels, 2002*

### ■ **Setting market targets in function of carrying capacity**

One of the keys to developing a sustainable tourism policy is finding the right balance between the number of tourists for the area and its carrying capacity. If the number is too low, the economic return may be too little for the investment needed, if the number is too high, tourism will end up destroying the very thing that attracts visitors in the first place. Overcrowded sites can result in damage to the environment, disruptions to local communities, a lowering of visitor satisfaction and eventually reduced earnings.

*How many people can the area attract?*

Thus, as part of the overall objective, and in light of the sustainability criteria, it is helpful to try and set a target for the number of tourists the area wants to attract. This will not only provide a ball park figure to aim for, but will also help to estimate the number of bed places, type of attractions and supporting infrastructure needed, as well as the potential economic returns from tourism. Where tourism is already present, it will help to guide further developments or re-adjustments that may be needed to make the tourism product more viable and attractive.

In this respect, the different market surveys should provide useful guidance as to the current potential within the different market segments. For instance, is the aim to attract a small number of *committed* tourists interested in activity sports because the resources are ideal for this and the economic return may be higher? Or, is it to attract a larger number of *interested* tourists, because there is a wide range of cultural and natural features available not far from a major town? Or could it be a combination of all of these.

*What is its carrying capacity?*

As for determining the overall carrying capacity of the area, (i.e. the number of tourists the area can accommodate with high levels of visitor satisfaction and little impact on the environment) some estimates may already have been made for individual heritage features. It is however a notoriously difficult task to aggregate these

figures for the destination as a whole. Yet, it must be done to ensure that the number of tourists does not exceed the capacity of the area to support them. Addressing this concern after the facilities are already in place will be much more difficult.

Carrying capacity works on several levels: environmental, social, and even psychological. Sometimes these different elements re-enforce each other – a degraded site, for instance, will contribute to the impression of over crowding. Inevitably though, certain subjective judgements will have to be made since it is almost impossible to devise a purely objective model that can take all the complex inter-relations into account. This is especially true of social and psychological carrying capacities, which can vary substantially depending on the people involved.

Nevertheless, some broad guidance exists for certain fields. For instance, in the case of estimating the **environmental capacity** of a new destination, the following should be considered:

- the size of the area to be used for tourism (e.g. 100 ha in a 10,000 ha national park),
- the fragility of the environment (sand dunes are more fragile than deciduous forests, wet habitats are more rapidly eroded than dry habitats),
- the distribution patterns of the wildlife (do they roam widely or have they specific small breeding and feeding areas),
- the behavioural sensitivity of the animal species of interest (high or low tolerance to human presence),
- the estimated levels of traffic congestion along the main access routes,
- the capacity of the area to cope with additional water and waste pollution.

**Social and psychological factors** include:

- likely viewing patterns (is it likely to evenly distributed or concentrated),
- viewing choice (are there going to be few hot spots or a choice of sites to visit),
- visitor satisfaction levels (responses to visitor surveys about the attraction),
- visitor motivations (activity based tourism is likely to be much more tolerant of large numbers of people than tourists seeking peace and quiet),
- the topography of the landscape (a hilly landscape will mask the number of visitors present at any one time much better than an open plain);
- ratio of tourists at peak times to the number of inhabitants.

Having estimated the number of potential tourists and the maximum carrying capacity, it should now be possible to set an overall target of tourist numbers for the destination as a whole. Again, it must be stressed that this is only a rough estimate and not an absolute figure. Its purpose is to help guide those involved in the tourism business as to what they should be aiming for, and to provide a benchmark against which performance can be assessed. As such, it will be necessary to continuously review and adapt this target as the destination evolves (see chapter 9).

### 7.3 Choice of facilities and services

This overall target will help to determine the type of services and facilities needed. Already, during the situation analysis, it will have become clear what is feasible and where, what already exists, and which aspects fall into the 'need to have' category rather than the 'nice to have' one. It goes without saying that the former should be treated as priority since they form the backbone of the tourism product. Ideally, these priorities should be established and constantly reassessed through contin-

uous dialogue with, and participation of, the different stakeholder groups so that everyone works towards the same goals. It will then be up to the individual stakeholders to decide which options are most attractive to them and which require a more concerted effort.

The following recaps on the different facilities and services that are needed in a sustainable tourism destination, more site specific details will probably have emerged during the situation analysis (see chapter 6):

*Need for a critical mass of attractions*

- **Primary attractions:** The primary attractions are what draw people to the area in the first place and animate their holiday once on the spot. They are therefore a vital component of the overall tourism product. It is important to ensure that, in overall terms, there is a sufficient diversity and a 'critical mass' of different attractions available. Not only will this influence people's decision to visit the area, but it will also keep the tourists occupied for longer, enhance their visitor experience and, hopefully, encourage them to return. This means offering both major and minor attractions. The former could act as a beacon for the area, (e.g. a national park visitor centre) but requires more substantial investment whilst the latter would help to diversify the offer and may be less costly to get going.

When dealing with natural and cultural heritage tourism, particular attention is required in developing imaginative, personalised and user-friendly attractions that enhance the area's heritage values and contributes to the visitor's positive experience of the place. This can go so far as to determine the type of architecture or materials used to reflect local traditional styles or historic design motives.

- **Accommodation and other related facilities:** Again, the situation analysis and market research studies will help to highlight the different services and facilities that need to accompany the primary attractions. This will in turn guide the private sector in determining the choice of facility to be developed or enhanced, be it a hotel, campsite, self catering cottage or restaurant, snack bar, souvenir shop, etc...



- **Infrastructure:** It is often necessary to improve the overall infrastructure of roads, walking paths, cycling routes, signposts, public transport facilities, etc... to ensure that the level of access to the different attractions, and within the destination as a whole, is appropriate. This is essentially the responsibility of the local authorities but would again benefit from discussion and dialogue with the stakeholders and the local population as the access routes have a multifunctional purpose that is equally relevant to the local community.

- **Information and interpretation:** Access of an altogether different kind should also be provided. Tourists need to know what exists in terms of tourism facilities and services and should be given an opportunity to learn more about the area's characteristics and heritage. This involves two forms of communication.

*Informing tourists of what is available*

The first provides basic, readily available, accurate and user friendly information to help orientate visitors and to inform them about the attractions in the area. Every individual facility ought to consider developing some form of information leaflet or website in order to advertise itself, but equally useful is to have a

brochure or guidebook summarising all the different attractions, events and facilities on offer in the destination. To be attractive, this should provide more than just a list with addresses and the opening times of the different facilities. Well presented brochures that give a flavour of the area and of the different attractions are more likely to be picked up and used (and even taken home) and are therefore well worth the financial investment.

How tourists obtain this information is equally important, sometimes it may be appropriate to have a physical focal point such as a tourism information centre or kiosk where the brochures, maps, guidebooks, etc. can be picked up and where additional advice can be sought. Otherwise, it may be that the different attractions themselves can act as suitable outlets. Either way, it will be important to ensure that tourists are given every opportunity to obtain this information easily.

*Raising awareness*

The second communication tool is based on interpretation as opposed to information. This is particularly important for tourism destinations based on natural and cultural heritage. Good interpretation helps visitors explore and understand a little more about the places they visit. In doing so, it adds depth to the tourists' experience making the visit something more than just a trip to see the sights. It also helps to raise awareness of the importance of conserving local heritage. Interpretation can be done in different ways. The most obvious is through exhibitions, displays and individual interpretation panels. Generally, with heritage-based tourism, the more personalised the interpretation the more effective it is. Thus, guided walks and talks are especially popular amongst this type of tourist.

- **Legislation:** Finally, consideration should be given to whether additional legislation is needed to re-enforce certain aspects of tourism development as described in chapter 6. Environmental legislation, for instance, is essential for safeguarding natural resources from negative impacts, be they from tourism or other activities. Appropriate legislation for land use planning and construction is equally important as it will prevent an uncontrolled mushrooming of unsightly buildings out of character with the overall image of the place. It will also ensure that other land uses are sensitive to the requirements of tourism and of the natural and cultural heritage resources.

### ■ *A geographical overview*

Once the range of existing and potential attractions has been identified, it is useful to visualise these on a landscape map as this will help to determine their geographical relation to each other and identify in particular:

*Mapping tourism resource*

- potential clusters and growth poles (natural concentrations where part of the facilities can be located or where a gateway can be developed for the outlying areas),
- points of access to the area, and the type of infrastructure required to support the tourism products, roads, sign posts, parking lots, ...,
- possible thematic routes or circuits between the various attractions, including walking and cycling trails, etc...,
- fragile areas where tourism impact should be minimised or prevented.

# Le Parc Naturel Régional des Volcans d'Auvergne

**120 km N. S.**

**De 400 à 1885 mètres**

- 295.000 ha : le plus grand parc naturel régional de France / longest regional park in France / Der größte regionale Natur Park Frankreichs / El parque natural regional más extenso de Francia
- 4 massifs volcaniques / volcanic massifs / vulkanische massiva / reactos volcánicos  
 Monts Dômes (Puy-de-Dôme 1.463 m)  
 Monts Dorés (Puy de Sancy 1885 m)  
 Cézallier (Signal du Lignon 1557 m)  
 Monts du Cantal (Puy de Sancy 1885 m)
- 1 vieux plateau granitique / ancient granite table land / alte granithochfläche / antiga mesa granítica / Arteson

**91.000 hab. / inh / anw / habitantes (hab.)**

152 communes / villages / Gemeinden / municipios / du Cantal et du Puy-de-Dôme

**Legende:**  
 - Parc de Parc et exposition  
 - Maison du Parc (à voir selon le versant)  
 - Centre du paysage  
 - Informations  
 - Réserve naturelle

**A Montfoucault exposition "des Volcans et des Hommes"**  
 Volcanoes and Men at Montfoucault/Ausstellung: Mit Vulkanen und Menschen/Volcanos y Humanos en Montfoucault

## Bienvenue dans les Maisons du Parc

<p><b>1 MAISON DE LA MONTAGNE</b>                  Maison traditionnelle construite en pierre et bois, elle est typique de la région. Elle est ouverte de mai à septembre.</p>	<p><b>2 MAISON DES PRÉS</b>                  Maison traditionnelle construite en pierre et bois, elle est typique de la région. Elle est ouverte de mai à septembre.</p>	<p><b>3 MAISON DU CAMPAGNE</b>                  Maison traditionnelle construite en pierre et bois, elle est typique de la région. Elle est ouverte de mai à septembre.</p>	<p><b>4 MAISON DE LA FORÊT DE CHASSE</b>                  Maison traditionnelle construite en pierre et bois, elle est typique de la région. Elle est ouverte de mai à septembre.</p>
<p><b>5 MAISON DE LA VALLÉE</b>                  Maison traditionnelle construite en pierre et bois, elle est typique de la région. Elle est ouverte de mai à septembre.</p>	<p><b>6 MAISON DE LA MONTAGNE</b>                  Maison traditionnelle construite en pierre et bois, elle est typique de la région. Elle est ouverte de mai à septembre.</p>	<p><b>7 MAISON DE LA MONTAGNE</b>                  Maison traditionnelle construite en pierre et bois, elle est typique de la région. Elle est ouverte de mai à septembre.</p>	<p><b>8 MAISON DE LA MONTAGNE</b>                  Maison traditionnelle construite en pierre et bois, elle est typique de la région. Elle est ouverte de mai à septembre.</p>

When it comes to planning tourism development within a protected area, mapping is particularly important. A detailed zoning map of the site will help identify areas according to their conservation value, tourism potential and vulnerability. Once these areas have been mapped, it will be possible to carefully channel and zone visitor attractions within a nature reserve in such a way that it can offer a satisfying experience to the different type of visitors without compromising the overall conservation resource. The least fragile outer zone, for instance, is often the best place for a visitor centre. From here, a number short circular routes could be created to give those who visit the centre a chance to experience the protected area's natural landscape. This is sometimes referred to as the 'honey pot effect' and is often enough to satisfy the casual visitor. If more committed tourists are also expected, further routes could be developed in such a way as to make these rather more challenging whilst still avoiding the most sensitive areas.

## INGREDIENTS OF A TOURISM STRATEGY

### Natural features

- *The objective*
- *Policy objectives based on sustainability*
- *Overall target for tourism numbers*

### Facilities and services

- *Primary attractions*
- *Derived offerings (accommodation, restaurants)*
- *Information and marketing facilities (tourism information centres, brochures, guides, ...)*
- *Supporting infrastructure and legislation*
- *Spatial organisation of physical tourism product (growth poles, circuits, ...)*
- *Product diversification (events, complementary services, sale of local products)*

### Quality standards

- *Use of national and international quality standards or accreditation systems*
- *Development of local quality labels or agreements*
- *Use of wider quality networks*

### Marketing strategy

- *Market research*
- *Image creation*
- *Choice of promotional material*
- *Choice of distribution channels*
- *Type of packaging for tourism product*

### Organisational structure

- *Choice of lead organisation to manage the tourism strategy*
- *Allocation of respective roles and responsibilities*
- *Regrouping into associations and professional groups*
- *Timetabling*
- *Channels of communication and coordination*

### Individual project development

- *Development*
- *Screening*
- *Prioritisation*

### Sectoral support

- *Business support*
- *Training*
- *Best practice exchange*

### Funding

- *Funding for project implementation*
- *Funding for strategic coordination and support*
- *Funding for supporting services*
- *Funding for monitoring and market research*

### Monitoring, feedback and adaptive management

- *Performance indicators*
- *Stress indicators*
- *Maintenance of tourism attractions*
- *Periodic tourism strategy review and adjustment*



## 7.4 Product diversification

So far, attention has focussed on the classic tourism products: attractions, accommodation, facilities, information, etc. ... But whilst this in itself will already make up a viable product there are other complementary activities to consider when developing or re-orientating tourism around natural and cultural heritage. These can diversify the offer, increase visitor satisfaction, help prolong the tourism seasons and spread the economic and social benefits to other sectors.

### ■ *Events and activities*

When people visit an area for its natural and cultural interest, they are often interested in participating or witnessing some of the local events and festivities. Sunday markets, for instance, are very popular, so too are events or activities in the evening. Tourism can help revive past events and traditions and so be of mutual interest to the tourists and villagers alike. However, in order to ensure their appeal, it is essential that the events are of good quality and retain their authenticity.

*Complementary activities*



Events can also be used to try to stimulate tourism during the low seasons. A festival or well-publicised event, such as a harvest feast, or birdwatching event can raise the profile of the area and so encourage visitors to come out of season. What is more, once these events are established, if they are well managed, and of high quality, they will be able to draw in a faithful clientele who will come back time and again.

### ■ *Local products*

Offering local products is another way of diversifying the tourism offer. Tourists are increasingly interested in buying and sampling local products, be it local foods and recipes or typical handicrafts etc.... They are particularly attracted by the idea of local products being 'fresher' (implying more taste in the case of food), more specialised (rather than factory produced) and authentic (not found elsewhere). As such, offering such products could substantially add to the visitor's experience of the destination and re-enforce its distinctiveness.

Considering that tourists tend to spend 2-3 times more money once they arrive at the destination, this option should be actively explored wherever possible.

Local restaurants and hotels are the most obvious and important outlets for local food products. If they can be persuaded to buy locally and offer regional specialities, the potential benefit for local producers could be quite substantial. For this to work however, a number of obstacles will need to be overcome within the local food production chain. In particular, it will be important to ensure that local producers are able to produce a steady, high quality, and large enough supply of food at reasonable cost to meet the demand. Also, as many of the producers may be small and specialised, a distribution network should be considered. Local authorities and the Chambers of Commerce could help in this respect, for instance, through training and advice in marketing, quality labels and professional associations.

*Selling local food products*

Other obvious outlets for local products are the visitor attractions themselves, local souvenir shops, direct sales from the farm or even hotels, restaurants, etc. ... In all cases, the sale of local products is economically very interesting as the return on these articles can be up to 200% (this is also true of renting equipment such as binoculars or wetsuits etc...). The products need not be restricted to food, local handicrafts, locally produced postcards, T-shirts, guidebooks, maps, equipment, etc. ... are equally popular and could be offered wherever the situation lends itself. But again, attention must be paid to presentation, price, delivery and quality. If the display is poorly arranged and resourced, it is highly unlikely that tourists will stop and look, and buy.

*Local souvenirs*

Finally, it is worth investigating whether the making of these local products cannot be turned into an attraction itself, with the option of purchase at the end. For instance: traditional craft-making skills or farming techniques... This will not only enhance the visitor's experience but also provide a dedicated outlet for the products.



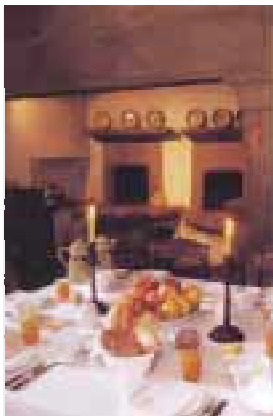
## 7.5 Quality products

### ■ *Integrated quality management*

Providing a quality facility or service for tourists is a fundamental part of developing a sustainable product, especially when dealing with the smaller and less accessible market segments based on natural and cultural heritage. In these circumstances, the better the quality of the tourism product, the more satisfied the tourist is likely to be of his holiday experience and the more likely he is to stay longer, come back, tell others and be concerned about the conservation of local heritage.

*Quality must be assured all along the tourism chain*

To be effective, quality needs to be assured all along the tourism chain from first marketing messages through to the provision of accommodation, food, information, orientation, town planning, etc. ... Each one of these products can make an important contribution to the overall level of visitor satisfaction. By the same token, it only takes one to be poor for this level to drop. This again reflects the need for a well-organised and coordinated tourism strategy, which encourages all partners to work together in enhancing the overall quality of the destination and in ensuring that the quality standards are maintained, and where appropriate, enhanced as tourism evolves.



In this respect the Commission's reports on the Integrated Quality Management (IQM) in rural, coastal and urban areas can be a very useful guide for tourism based on natural and cultural heritage (see bibliography for details). The IQM approach is based on two key elements: a focus on visitors and the involvement of local people and local tourism businesses in the management of the destination. When it comes to the quality of the services, as much importance is attached to offering a personalised, genuine and informed service as to being efficient and professional.

For instance, a hotel that in addition to providing clean, well appointed bedrooms, makes an effort to create a place with character and a welcoming atmosphere, (e.g. using vernacular buildings or local furniture, placing fresh flowers in the room) is more likely to build a good reputation for itself and draw in a faithful clientele than one that does not offer such a personalised service.

The same is true for a visitor attraction that has an informed staff, quality information about the attraction and offers the possibility of small guided tours. These seem like minor additions, but they count for a great deal amongst tourists interested in nature and culture.

### ■ *Setting standards*

The most obvious way of developing and advertising quality is to set common standards which are recognised through labels or awards. Quality standards can be sector specific or generalised, they can be developed locally or form part of national or even international schemes.

*Using quality labels*

Many countries already have a national grading and inspection scheme for hotels and restaurants, which recognises that certain basic standards have been met and that specific facilities are provided (e.g. system of stars). Some establishments may want to go one step further and join national or international networks of accommodation providers who focus on quality.



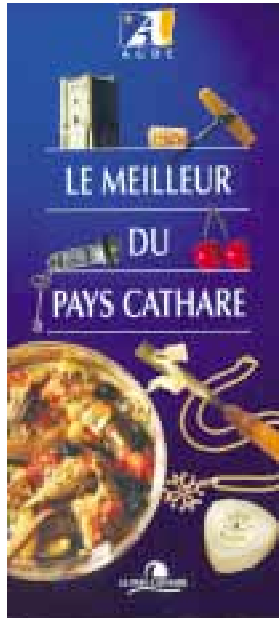
The advantage of these networks is that they have their own marketing strategy and so have built up a reputation for quality which some tourists actively seek out when choosing a place to stay. They also provide clear benchmarks for the level of standard applied, which is known to both the establishments and the tourists.

Other important forms of quality standards, that tourists interested in nature and culture may be on the look out for, are those relating to the environment. Again, accommodation providers are often involved in these quality labels in view of their potentially polluting activities (if only by the sheer number of people present in one location). Different countries have developed their own labels depending on the perceived importance of the environment for their customers. In France, for instance, the Gites de France joined forces with World Wildlife Fund to develop a 'Gites Panda' label for environmentally friendly accommodation within natural parks. There are also international standards such as ISO that could be used, for instance, ISO 14000, which assesses the overall environmental impact of the facilities (waste water, recycling, etc. ...).

*Environmental quality standards*

Some environmental standards are voluntary, but equally effective, such as the European Charter for Sustainable Tourism in Protected Areas which sets out a series of principles on how to develop tourism in these areas in a sustainable manner. This not only provides recognition for their efforts, but also helps them through the process by offering detailed guidelines on how to go about developing such forms of tourism.

Finally, in some countries, attention has focussed on introducing a 'green business award' to encourage tourism businesses to integrate environmental concerns direct-



*Proper promotion is vital*

ly into their management processes. This is equally relevant for tour operators and service providers (eg canoeing or white water rafting companies) who should also be involved in these schemes, either through self-regulation, or as schemes promoted by the local authority.

The advantages are quite evident. In the UK recently the Association of Independent Tour Operators (AITO: 150 members) introduced a responsible tourism policy in response to a recent survey of tourists that showed that few had any fidelity to the tour operators, yet attached a lot of importance to environmental issues when choosing their holiday. By demonstrating that they too have 'green' credentials, these specialised tour operators hope to be able to attract a more faithful clientele and eventually a greater share of the market.

An alternative to a purely sectoral approach is to develop a series of local quality standards for a whole range of different tourism components from locally produced foods to visitor attractions to accredited guides. Each sector would develop its own set of quality criteria, but would be awarded the same logo. If successful, this will not only raise the general standard of the tourism products and help to build a professional and integrated tourist industry but also add to the overall image and reputation of the area as a quality destination. It does however require a fair amount of organisation, cooperation and time to get established, both with the different economic groups and with the tourists themselves and so should be carefully planned.

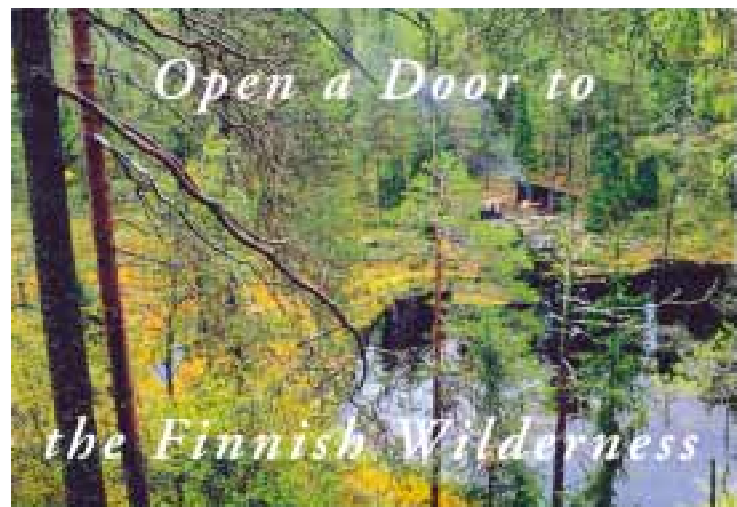
## 7.6 Marketing strategy

### ■ *Essential components of a marketing strategy*

Another key component of any tourism strategy has to be the marketing and promotion of the tourism products and of the destination as a whole. Even the most impressive attraction will fail without proper promotion, this is especially true for destinations that aim to attract more specialised markets. Because marketing is such a complex subject it almost deserves a strategy of its own to help plan, coordinate and fund the different actions needed. Only then will it be able to function both at the level of the individual tourist facilities and of the destination itself.

*Creating the right image*

Tourism based on natural and cultural heritage is already geared towards particular market segments, this means that the marketing strategy should also be clearly targeted at these types of tourists. The market research studies paint a visitor profile of those likely to visit the area and are therefore useful in identifying the best channels of communication for reaching them and guiding the creation of the right image for the destination. Because so much of tourism is down to ephemerals, such as expectations, experiences, feelings, emotions, it is important to concentrate on developing an appropriate image of the place that will help to encapsulate some of these senses and so increase the overall appeal of the destination.





This can then be backed up by promotional material, which provides practical information for prospective visitors. If certain branding techniques, such as design of a logo or a typeset are used, these promotional materials will reinforce the overall image of the destination.

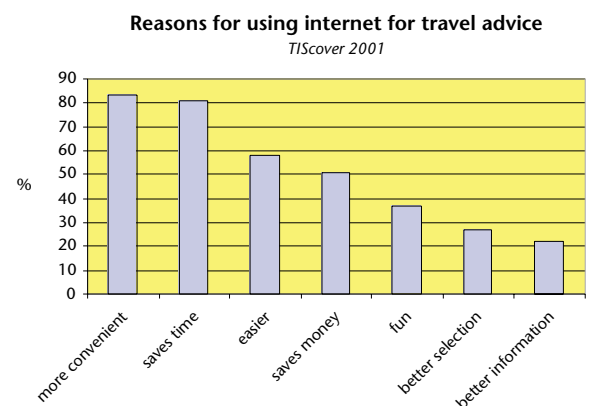
In this respect, it is very important to ensure that this material is accurate, well written (without too many superlatives!) and pitched at the right level to be attractive to the target audience. This will ensure that people do not arrive with expectations that cannot be met, otherwise, most likely, they will end up disappointed with their experience. Again, a satisfied customer is more likely to encourage others to visit. A reputation built up through 'word of mouth' is like gold dust to marketing managers.

Finally, it should also be remembered that a reputation is not created overnight, it can take up to five years before the marketing strategy begins to take real effect. Consequently, the strategy must be seen as a long-term activity to be constantly reviewed and updated according to changing market needs and visitor feedback. It also means that there is considerable merit in devising a marketing strategy that continues to inform and target tourists after they have left the destination. This will help to build up a faithful clientele and encourage more repeat visits.

### **Promotional techniques**

There are various distribution channels to explore for promoting a destination that is based on natural and cultural heritage.

- *The website* is increasingly popular these days and is an ideal way to reach an international audience, especially for the smaller, newer or more remote destinations that do not have the budget (or the market even) to go for major promotional campaigns. It can be used both at the individual business level, and at the destination level but requires a certain expertise to ensure the final website is user friendly and regularly updated.



- *Specialised journals and magazines* are also ideal for reaching the different markets – their readership already targets the kinds of people the area is looking to attract, and so are likely to be more receptive to advertisements about a destination that offers the type of activities they are interested in. Encouraging entries into independent guidebooks is also useful. Finally, if the tourism product is quite specialised (e.g. focussing on bird-watching) it may be worth the investment to invite journalists from these magazines out to write an article about their experience.

*Internet is increasingly popular*

- *Trade fairs* are amongst the more classical forms of promotion. However, for many of the destinations based on natural and cultural heritage, their utility might be quite limited compared to the time and expense involved in attending. Trade fairs are really only useful to reach intermediaries like tour operators etc.... Only a tiny percentage of end consumers (tourists) base their decision on information obtained at a tourism fair. Thus, for international fairs it is probably more cost-effective to contact the national and regional tourism boards to see

*Trade fairs are not so effective for specialised markets*

if they would be willing to include the destination into their exhibition. Otherwise, it is also worth looking out for the more specialised trade fairs (e.g. the Dutch “Op Pad”, which is the largest trade fair concentrating on walking and hiking) or the ones geared to national or regional audiences. Here, the audience is already more focussed and limited and so, more likely to be receptive to a destination based on natural and cultural heritage.

## 7.7 Pricing and packaging

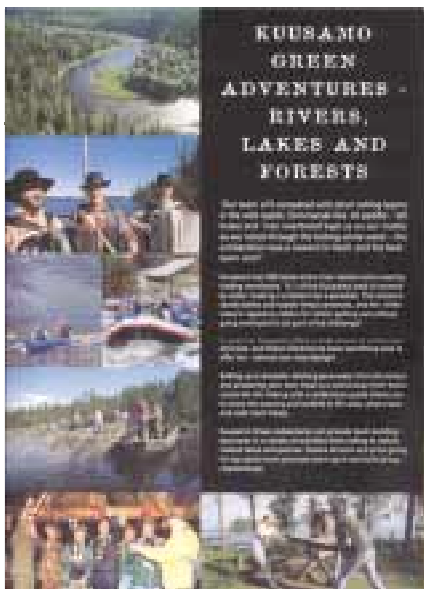
Finally, consideration should be given as to how the tourism products should be priced and packaged. Pricing is again notoriously difficult to determine since there are so few studies undertaken on these issues within the specialised markets. It is therefore worth ensuring that the benchmarking studies of similar destinations include an assessment of costings of the different facilities and services on offer there. This will help to ensure that a destination does not price itself out of the market. The other side of the equation is to consider the economic returns in function of the investments required, bearing in mind that tourism tends to be seasonal and that income is therefore not guaranteed all year round.

In terms of packaging; because these destinations are likely to be relatively small-scale compared to the mass tourism places, they are unlikely to be picked up individually by the big travel agencies or companies. There are, however, other methods that can be used to sell and package the products, considering the market target for tourists is already fairly specialised, and often people seeking out these sorts of heritage based destinations like to travel independently anyway.

Again, the internet can be an easy to use and rapid tool for making bookings, provided of course that the businesses using this service are, in turn, able to respond rapidly and efficiently to requests. Otherwise, a central reservation system might be considered as it offers a single contact point to prospective clients who can then book a range of different attractions without having to reach each one individually.

*Creating an all inclusive offer*

Alternatively, it is well worth exploring whether there are any overall packages that can be created, for instance walking holidays, wildlife viewing trips, business incentive trips, etc. ..., which would include local transport, accommodation, food, and a number of attractions or events over a given period of time. These could be sold directly via local specialised service providers set up for that purpose.



They could also be offered to specialised tour operators outside the tourism destination. This is especially useful for reaching potential tourists further a field, for instance in other countries. These tour operators have the experience of selling such packages and have their own well developed marketing channels, they could therefore bring in significant numbers of tourists in small groups, eventually also off season. Packaging however requires both the facilities (e.g. hotels with more than 10 beds) and agreements between different attractions, so much will depend on the local interactions and the tour operators preferences as to what kind of packages can be created.

Other forms of packages might also be considered on a more localised level, for instance a system of discounts or

awards for clients who use the facilities of those that have come together in the form of a network. For instance, a pass that would entitle a visitor to one free entrance for every three attractions visited, or a souvenir book for staying at three hotels within the same network... This is really down to the imagination and inventiveness of the different businesses, but should be given full consideration, as it is a very popular means of encouraging tourists to stay longer and visit more.

Similarly, as mentioned previously, joining the wider networks of associations, such as the Gites de France or a small charming hotels network, could provide an important source of clients, even if it means the individual return on each visitor is less because of the commission fees charged.

*Tackling  
seasonality*

Finally, in order to combat the problem of seasonality, low season promotions should be considered to stimulate trade. This could be done at the level of the individual businesses, for instance hotels offering faithful clients a special deal of three nights for the price of two, or a gastronomic weekend. Or, it could be done on a wider basis involving cooperation with transport companies (airlines ferries, railways, etc. ...) and advertisements in national newspapers.

## 7.8 Finding allies and networking

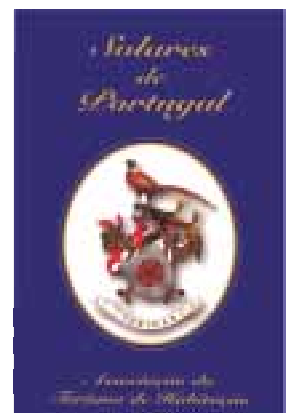
The different sections in this chapter will have illustrated the particularities of tourism based on natural and cultural heritage. This makes their marketing rather more difficult and time consuming than for the more classic forms of mass tourism. There is simply not the same volume of tourists involved or level of interest from the big tour operators to facilitate this process. In the absence of these classic options, alternatives have to be found to reach the target audiences.

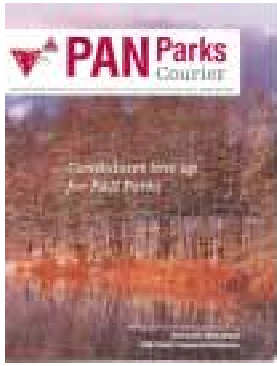
This is especially important when trying to reach foreign tourists. Most nature and culture destinations are quite successful in attracting tourism from neighbouring towns or regions. Also, with time, and provided that the tourism product remains dynamic and of a high quality, they are able to rely increasingly on 'word of mouth' to bring in additional regional tourism. In some cases this may be enough, but usually it is better to try to develop a range of tourism sources so as not to be too reliant on any one area. Also, foreign tourism can be economically more viable as these visitors tend to stay longer and spend more once they get there.

*Networks  
are a good  
way to  
reach  
foreign  
markets*

There is therefore considerable merit in trying to network and forge alliances with like-minded tourism destinations or attractions elsewhere in the country or in Europe. There are, as yet, few examples of such networks, but where they do exist, they have been very successful. Tourists who have experienced one tourism product and been satisfied with it are more likely to try another in the same vein, especially in the more specialised market segments based on nature and culture. An established network can capitalise on this potential interest by providing easy access to information on other attractions and a guaranteed standard of service or quality. Moreover, as more people use the internet to find out about possible holiday destinations, the task of promoting such networks is now easier than ever before.

Tourism networks can operate at any level. Some of the most successful to date have involved different forms of accommodation, such as the 'Gites de France' network or the 'Europe de Traditions', which group together similar types of accommodation around a common





theme. Others concentrate more on a specific tourism segment, for instance, the Pan Parks initiative being promoted by World Wide Fund for Nature WWF and the Dutch Molecantan group, aims to link up different national parks across Europe through a uniform vision of high quality tourism and strong conservation principles.

Alternatively, different cultural or natural routes and itineraries could be explored, such as those promoted by the Council of Europe. Again, they regroup specific types of cultural interests along a similar theme. This does not mean that the tourist will necessarily undertake the whole route in one go, rather it could encourage them to discover other areas in Europe as they learn more about the different routes.

One could envisage this being applied to natural heritage as well, for instance, through a network of protected sites that are important for the migration of species from their summer feeding grounds to their winter homes. One such initiative is being developed with Intereg IIC funding. Entitled the "goose track" its intention is to create a chain of (geese) visitor centres along the North West European flyway of this species.

## 7.9 Updating and adjusting the strategy

Finally, to conclude this chapter, a word must be said about the cyclical nature of tourism. A tourism product does not follow the standard linear route of product development from conceptualisation, development, to end product. As chapter 9 will illustrate there is a constant need to take stock, fine tune and adapt the different products and approaches to ensure that tourism remains dynamic and well suited to the tourist markets. As a result, the issues raised in the previous two chapters regarding market research, situation analyses, SWOT, tourism strategies etc... can be undertaken at any stage in the process whether tourism already exists in the area or not.

*Tourism is an iterative process requiring constant feedback*

For instance, it may be that a well established tourism destinations wishes to re-orientate itself more towards nature and culture tourism, or that the area is noticing a decline in tourists in the last couple of years. Market research studies and SWOT analyses are as relevant at this stage as they are at the very beginning of the process, since they help to develop a clear picture of tourism in the area and of any potential problems or shortcomings. Only then will it be possible to find solutions or ideas for alteration, expansion, consolidation etc....

As the diagram on page 33 showed, tourism destination management is an iterative process that requires all stages of the development process to be regularly revisited and assessed so as to be sure that the tourism product remains viable and attractive.



# 8. Creating a viable tourism product

## 8.1 Implementation

The previous two chapters illustrated the wide range of different facilities and services needed to make up an overall tourism product as well as the diversity of stakeholders likely to be involved. The tourism strategy provides an orientation for developing such a product, but this must then be translated into action – mainly by private businesses. Collectively, Small and Medium-sized Enterprises (SMEs) represent the backbone of most tourism destinations based on natural and cultural heritage and should therefore also be the focal point during the implementation stage.

In this chapter, basic guidance will be given for individual businesses, or any other interested organisations, on how to go about designing a viable tourism facility or service, be it an attraction, hotel, restaurant, package tour, shop, etc.... Later on, attention will focus on ways in which these individual businesses can be supported, through various coordinating structures and mechanisms, so that the overall tourism product for the destination is both coherent and dynamic.

Again, this is relevant for any stage in the tourism development process, whether at the very beginning or in an already established destination.

## 8.2 SMART projects and business plans

Irrespective of the type of product to be developed, there is one golden rule for all tourism ventures. They must be carefully planned and thought out. This common sense approach is relevant to all businesses, but is especially important in the tourism sector, where the emphasis is on micro enterprises. SMEs are heavily dependent on outside factors such as changing markets, financial support, qualified staff, ... The stakes are therefore particularly high, which makes careful planning a *sine qua non* condition of any tourism initiative.

One very useful tool for designing and managing a tourism product is the so-called SMART method. This helps to conceive a project that is:

*SMART projects*

- **Specific:** where you know what exactly you want to happen.
- **Measurable:** related to clear targets which are capable of being quantified and measured.
- **Appropriate:** reflective of the resources available and that is both customer orientated and in keeping with the local environment.
- **Realistic:** that has a good chance of success compared to the investment needed.
- **Timebound:** linked to a logical timetable which specifies when each objective or critical activity will be done.

*Preparing a  
business  
plan*

The SMART method can be put to use in developing a business plan. Every venture should start out by writing up such a plan. This will help to work through all elements that need to be taken into account before launching a new initiative. It will also highlight potential difficulties that need to be overcome and provide a mechanism for planning the development and subsequent management in a logical manner.

Finally, a business plan can also be used to determine the level of investment needed to make the venture profitable and to lobby for outside sources of funding, be it a loan from the bank or start up capital from other incentive schemes. Writing a business plan may be a time consuming exercise, but it does not necessarily require any particular business management skills. The only real skill needed is the ability to think logically about what it is that you want to develop and how (see model).

In devising a business plan, the following steps should be followed:

- *Establish a business objective:* what is your final goal, what do you want to get out of developing a tourism product;
- *Carry out internal and external research:* to ensure that the business venture is going to be realistic and feasible. The situation analysis, market surveys and tourism strategy can all help you to decide whether or not there is a good market for this type of business. A thorough check of your own resources will determine whether you have enough of these to be able to create a viable product. This is especially important when it comes to finances, it can take many years to recover the initial investments made and to start making a profit. During that time there needs to be enough cash flow to be able to pay all outlays. Many businesses fail because they are under-funded or not good at managing finances.
- *Prepare your own SWOT analysis* to determine your own strengths and weaknesses and the potential opportunities and threats.
- *Plan what needs to be done when,* looking at all aspects from basic infrastructure to staffing, equipment, promotional material, etc....
- *Consider how to tailor the product to customer needs:* depending on the type of tourists to be targeted, e.g. quality, hospitality, fidelity services.
- *Seek additional sources of financing and advice or training* whilst developing the idea.
- *Devise a marketing strategy:* to determine how to make your product known, how to encourage return visits, fidelity, and year round interest. Bear in mind the 4 Ps that make up a marketing mix: product, price, promotion and place.
- *Write up the business plan:* that is an honest and realistic reflection of the above. There is no point painting too glowing a picture of the potential returns as you will be the first to suffer if this turns out to be unrealistic or over-ambitious.

## KEY ELEMENTS OF A BUSINESS PLAN

### Market:

- *What have you got to sell?*
- *Who would want to buy it?*
- *How much are they willing to pay?*
- *How do you find them?*
- *How do you convince them to buy?*
- *How much does it cost to reach them?*
- *How long would it take to get enough customers?*

### Competition:

- *Who else can sell this product or a similar one?*
- *How much do they charge?*
- *Why is yours better? How much can you charge?*
- *How would they react?*
- *What advantages do you have?*
- *What advantages do they have?*

### Resources:

- *What resources do you have available?*
- *How would you use these resources?*
- *How much would you pay for expenses, personnel, office, equipment, ... ?*
- *How long would it take to get enough customers to cover expenses?*
- *How much margin of error do you have?*
- *What is left for you?*
- *Do you need initial start up capital?*
- *Can you get additional capital? Loans?*
- *What do you pay for it? Cost, time, dilution of control, ... ?*

### Management

- *What skills do you have?*
- *What additional skills do you need?*
- *How will you manage the business, are you alone or sharing responsibility ?*
- *What staff do you need?*
- *Can you offer them training or career development prospects?*
- *How will you tackle seasonality (fidelity schemes, off season promotions, staff, ...)?*
- *How will you assess progress and get visitor feedback?*

### Financial plan

- *Projected cash flow*
- *Profit and loss statement*
- *Assets and liabilities*
- *Balance sheet*



## 8.3 Choice of lead organisation

Whilst individual businesses will form the backbone of the tourism facilities, and services, the overall tourism product still needs overall coordination and support to ensure that the destination as a whole remains attractive and competitive.

This is best done by appointing a dedicated coordinating body or lead organisation who is able to maintain an overview of progress in the development and management of tourism and who will keep a check on the implementation of the tourism strategy.

### *Role of the lead organisation*

More specifically this lead organisation could have a pivotal role to play in:

- stimulating the conceptualisation of new ventures and products;
- supporting projects financially;
- providing training and advice for those involved;
- coordinating the tourism product and strengthening the organisational set up;
- devising an overall marketing strategy for the destination as a whole;
- carrying out additional market surveys and research;
- keeping all stakeholders informed of progress and results;
- checking performance and adapting the tourism strategy and overall product in function of experience and feedback, and in collaboration with all involved stakeholders.



Considering that every stage of the process so far has involved extensive dialogue and participation from all groups, it should be clear by now where the different strengths and weaknesses of the stakeholders lie. There may already be a natural lead organisation, either in the public or private sector, or it may be best to consider establishing a partnership between different groups. The most common lead organisations for natural and cultural heritage based tourism include local authorities, groups of municipalities, park authorities or development agencies.

It is less frequent to see an NGO or private sector (through cooperatives or business associations) head up the strategy.

### *Public-private partnerships are particularly successful*

A particularly effective structure is one that combines the strengths of both the public and private sectors in an independent tourism association, in private-public partnership. The advantages of these independent bodies is that they are equally efficient at planning, coordinating and funding as they are at marketing and promotion. They are also in a position to hire dedicated tourism professionals to carry out the more specialised work and are accountable and transparent in their activities.

Whichever structure is finally set up, their remit should be established at the outset so that everybody knows how the tourism strategy will be managed and implemented and who is responsible for what. For instance: will the lead organisation

develop its own attractions to act as growth poles for the area and provide technical and financial assistance to private sector initiatives to complement these attractions? Or will the onus be on the private sector to develop the attractions with the lead organisation, functioning more in a supporting capacity, providing funding, training and coordination?

## 8.4 Sectoral support

Depending on the local circumstances and the priorities of the tourism strategy it is very likely that local businesses will require assistance in the initial project start up phase. The lead organisation, in coordination with others, can play a major role in ensuring that this support is devised so as to meet the needs of the different stakeholders involved.

*Stimulating  
new  
tourism  
ventures*

There are several supporting mechanisms to be considered:

- Providing an *advisory service* – e.g. an office with dedicated staff, preferably tourism professionals – where people can go for initial advice on ideas they may have regarding a tourism facility or service. In the first instance, guidance can be given on the priorities of the tourism strategy, the conditions of sustainability as well as the results of studies regarding potential markets. If the ideas are already at an advanced stage, further assistance could be provided in developing individual business plans and conducting feasibility studies.
- Another important form of support comes from the provision of *financial incentives* to help kick-start the different ventures and ease initial financial burdens. This could, for instance, involve special interest free loans for start up investments, or provide one off grants to modernise or transform houses, shops, businesses, etc. into attractive tourist products. It could even involve renting property off local land owners in order to develop a viable tourism product, which could then be passed back to the owners once it is up and running (e.g. after ten years). This is sometimes the only option available in those areas where interest in starting up small tourism related businesses is very low.
- *Training* is also much needed to help improve the professionalism of those involved in heritage based tourism. There are a number of basic obstacles to improving the skills of the tourism sector, especially when it involves SMEs: lack of labour force and high level of staff turnover, a low image of the tourism industry as a place to work, lack of basic skills and reduced competitiveness due to a shortage of prospects for career development, especially in micro enterprises.



Skills are required all along the tourism value chain ranging from basic business management skills to customer care and marketing. This is even more complex when dealing with tourism based on natural and cultural heritage, because added emphasis is given to sustainability and environmental concerns, quality of service and products, human resource management, IT skills (internet, websites, etc...), as well as strategic alliances and partnerships....

*Learning  
Areas*

To cope with this complexity, measures designed to upgrade skills for this kind of tourism should look towards more holistic solutions based on awareness raising

and exchange of practical experiences amongst all participants, rather than on the narrower top down approach of training. The European Commission recently devised an approach that encompasses this wider sense of learning into 'learning areas'. These are not physical areas where one goes to learn a particular skill, but rather an environment in which learning and innovation is encouraged amongst all stakeholders on all subjects relating to tourism.

If properly organised, this holistic approach will not only help to make tourism micro enterprises more professional and profitable, but also more competitive and sustainable, as both management and staff gain a better all round understanding of the sector and become more skilled and innovative in their approach.

Types of  
training  
needed

### Types of training often required in rural tourism destinations:

- Entrepreneurship
- Business management
- Staff management and supervision
- New technologies (internet, websites)
- Customer care and hospitality
- Communication skills
- Languages
- Marketing and promotion
- Quality
- Sustainability
- Knowledge of natural/cultural heritage

The way training is offered is therefore also important. Businesses often find it difficult to be away from work for more than a couple of days, thus, spacing out the training days into a series of self contained one day courses will make it easier for them. For raising awareness on natural and cultural heritage issues, it is often best to present these as information days rather than training courses. Businesses might not feel they need training in this area but could nevertheless be persuaded to attend, if it is presented as a discovery day instead (e.g. guided walks to some of the nature attractions ...)

Finally, the lead organisation can help to *create professional associations* amongst the different business sectors. This will not only improve their overall representation and input into the tourism strategy, but also incite them to work together on specific issues that could raise the general performance of the business sector as a whole. For instance, they might consider devising a quality label for their products, improving the overall production techniques and distribution channels, creating networks or special incentive deals amongst themselves to encourage tourists to visit more than one business, encourage referrals to each other when full ...

## 8.5 Overall coordination and financing

### ■ Keeping everyone informed

The lead organisation also has an important role to play in keeping all stakeholders informed of progress and of the latest developments in the tourism sector. This information should be fed back to all those concerned in a transparent manner

and on a regular basis. This will not only give individual businesses a chance to take the latest findings into account in the management of their own facilities and services, but also help to maintain general enthusiasm and momentum for the process.

There are several ways of achieving this, for instance through a regular newsletter, press releases or making studies readily available, but there is no substitute for regular face to face meetings at key stages during the implementation process. These will not only help to air and, if necessary, iron out any possible difficulties that may have arisen before they develop into real problems, but also incite further cooperation and partnerships between the different stakeholders.

### ■ *Searching for major funds*

Finally, the lead organisation is ideally placed to look for strategic funds to help implement the various provisions of the tourism strategy. Resources will be needed for long term activities - such as core support to the lead organisation, monitoring work, or adaptive management - as well as for initial high cost investments.

The most appropriate place to look for this type of funding is at the local level - auto financing is the surest and most reliable way of producing a viable final product. Funds can come from a variety of local sources, for instance, a pooling of resources amongst the tourism businesses, local sponsorship, or an allocation of the local public spending budget.

*Local sources of funds are best*



Outside funding sources can also be investigated, but it should be borne in mind that these tend to be for short periods only and are often subject to change. If this is not properly factored in, there is a real risk of becoming too dependent on this outside source, with the result that when it dries up the tourism destination also risks to collapse. Nevertheless, there is sometimes a merit in seeking outside sources of funding to kick-start the process and to help pay for any heavy initial investment costs.

For the majority of the non-traditional destinations, identified in the map in chapter 3, European Structural funds are available. These can be used to co-finance a variety of measures ranging from major infrastructure works, such as construction of new roads or a protected area's visitor centre or to small scale incentive schemes for individual businesses (such as through the Leader programme). To guide prospective organisations through the different criteria for funding, the Commission has produced an internet guide to EU support for Tourism Enterprises and Tourism Destinations (available on [http://europa.eu.int/comm/enterprise/services/tourism/policy-areas/eu\\_schemes.htm](http://europa.eu.int/comm/enterprise/services/tourism/policy-areas/eu_schemes.htm))

### ■ *Timetabling*

Finally, a timetable for implementing the tourism strategy is very useful to help develop the tourism product in a controlled and logical manner. It is neither desirable nor feasible to implement the tourism strategy all in one go. More effective

*Five year action plan*

would be to have a long-term vision of what needs to be done, and then to draw up a detailed list of priorities on a five year basis.

The first five year action plan should focus on developing the essential components of the overall tourism product so that the destination can function as a viable tourist attraction as soon as possible. It should, however, choose these priorities carefully so as to be able to leave a number of additional options and attractions for later. Not only does this allow the strategy and product to be fine-tuned in function of experience, but it also provides elements for keeping the destination dynamic and interesting in the later stages of development.

Measurable targets and milestones should also be established. Regular stock-taking will help to fine tune the tourism strategy, overcome any unforeseen obstacles and capitalise on the success factors (see chapter 9).



# 9. Monitoring and fine tuning

## 9.1 The need for regular monitoring

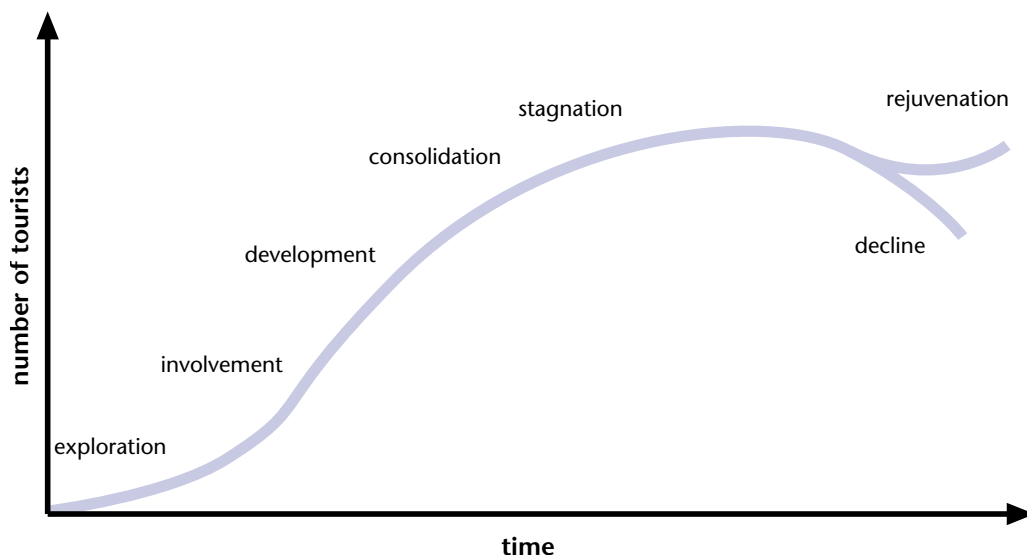
As this publication will have illustrated throughout, tourism is a dynamic and ever changing industry heavily dependent on a number of factors outside the control of those involved. It is inevitable, therefore, that tourism will evolve over time. A typical tourist destination life cycle normally runs through six stages (see diagram). To be able to respond to these changes and avoid the ultimate stagnation and decline scenario, it is vital that the tourism strategy has a dedicated monitoring programme in place. Only by having a 'finger on the pulse', through regular monitoring and feedback, will it be possible to react to issues early enough before they become problems, and so create a dynamic destination that is capable of adapting to market opportunities and changing preferences. This is especially true for the relatively smaller more specialised markets. Unfortunately, this element is all too often forgotten or given insufficient resources.

*Keeping a finger on the pulse*

## 9.2 Essential ingredients of a monitoring programme

There are essentially four imperatives around which the monitoring programme and adaptive management response should be developed. These find their roots, once again, in the pillars of sustainability:

- impacts on the local economy;
- impacts on the environment;
- impacts on society;
- needs and expectations of tourists.



Adapted from R.W.Butler 1980 in WTO guidelines for developing sustainable tourism 1998

Developing a monitoring programme around these four factors will help to:

- identify the positive effects of the strategy in these four areas;
- identify any negative effects;
- establish trends over time; and
- provide a feedback loop for initiating an appropriate management response.

The programme itself must therefore also determine what information is needed to answer these questions, how this is to be collected, who is involved, how often it will be collected and what it will cost. The latter plays an important part in the pragmatic reality of monitoring. There is little point developing a detailed and comprehensive monitoring system if the resources are not foreseen to make it work.

Dedicated tourism surveys are the most effective way of assessing progress, but they are expensive and need therefore to be interspersed with other monitoring techniques such as benchmarks or sustainability indicators. These are an increasingly popular means of fixing measurable parameters that help determine the impact of tourism in an area. They can indicate whether or not the positive effects are materialising as foreseen (performance indicators), or whether there are certain unexpected negative impacts that need to be addressed (stress indicators).

Indicators are however quite complex to establish. Universal indicators do not as yet exist although the World Tourism Organisation and others are working on this. As a result, every destination will need to develop its own set of indicators in function of its particular circumstances and the information it requires. The following provides some ideas of what to consider.

## 9.3 Performance indicators

### ■ *Gathering basic tourism statistics*

First, basic statistics are needed on the tourists and on their use of facilities in order to create an accurate picture of tourism in the area and to assess overall impacts and performance.

Amongst the elements that can be determined from these statistics are the following:

- *The total number of visitors per year will help to monitor progress over time, and reveal whether visitor numbers are increasing steadily, whether they have reached or exceeded the carrying capacity set in the tourism strategy, or whether they are starting to stagnate or decline.*
- *Monthly fluctuations will determine the seasonality of*

#### **Basic tourism information should include:**

- *Nationality and origin (within same country)*
- *Age/sex*
- *Occupation*
- *Income levels (often divided into 4 main brackets)*
- *Whether travelling in a group, family, couples, individually, etc...*
- *Length of stay*
- *Time of holiday (what dates)*
- *What they visited and did in the area*
- *Where they stayed*
- *How they found out about the destination*
- *What made them choose this destination*
- *Whether they had been before*
- *Whether they would come again*

tourism, whether there is a significant difference between the peak seasons and the low seasons, and what is happening during the shoulder seasons.

- *Holiday profiles* will reveal what people do whilst at the destination, whether they come for short trips or longer trips, for specific activities or for the area generally, for relaxation or to actively seek out certain nature and heritage features.
- *Visitor profiles* will provide a picture of the type of tourists that visit the area, where they come from, whether they travel in groups or alone, what age group and income class they come from....
- *Success of different attractions* Information gathered on each of the attractions will help to identify which ones are having more success than others and what the reasons for this might be.



How this is gathered will depend on the management set up of the destination. It may be that the management body has several key attractions and a tourism information centre where regular censuses can be undertaken or where visitor counters can be installed. It may even have a dedicated research team who are able to carry out regular surveys themselves. This is the ideal scenario. More often though, the options are limited so every effort should be made to involve all stakeholders in the process, wherever possible.

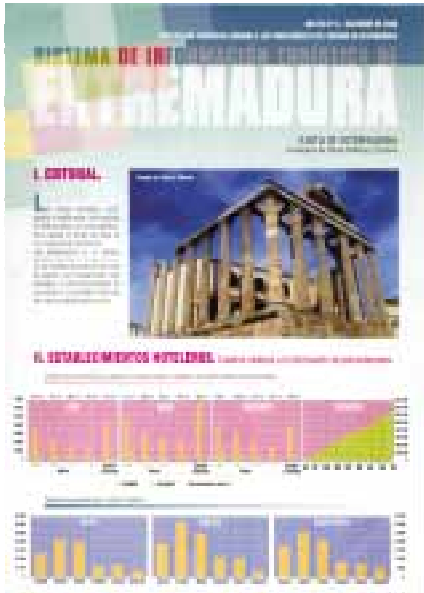
*Gathering information*

This would mean that every business would be encouraged to keep its own tourism records. Not only can this help them to assess their own performance and visitor satisfaction levels, but it will also provide the management body with the raw data needed to evaluate the destination's overall performance. If the use of questionnaires to gather this information is too onerous for some businesses, then providing visitors with a suggestions box or visitor book where they can write in their comments about the place is a useful alternative or addition. A periodic check of these will help to identify if the overall perceptions are positive or if there are an increasing number of negative comments.

At some stage though, a dedicated full-scale visitor survey must be undertaken. The importance of this cannot be over-emphasised. It is the only way to get a proper feedback on the effects of tourism and is therefore well worth the financial investment. Aggregating and extrapolating from the different sources of information will only highlight the most obvious trends, but will miss out on all the subtle nuances that a more detailed survey is capable of delivering, and that are so important for determining a suitable management response.

Ideally, this survey should be undertaken at least every two years so that progress can be determined over time. It should also involve tourism professionals, who have the experience in devising reliable questionnaires and interpreting the results.

A dedicated survey will help to fill gaps in the tourism statistics and provide feedback on the following:



- *Economic impact* for individual tourism businesses and for the local community as a whole. Interviews and surveys of these businesses coupled with an analysis of overall economic and employment trends will help to reveal whether the economic impact has been significant or not. It will help to determine, for instance, whether businesses are profitable and competitive, the local economy has diversified, employment figures have improved, and generally, whether the initial investments are paying off.
- *Environmental impacts* particularly as regards the conservation and protection of the natural and cultural heritage features upon which tourism is based. Are they in a good state of maintenance or have they suffered from wear and tear. Are there any positive spin-offs for heritage conservation generally in terms of greater awareness, more sensitive environmental policies, additional funds, etc....
- *Social impacts* for the local community in terms of better living standards or on the negative side high prices, better job opportunities and skills training. Also of interest are the less materialistic aspects concerning revival of traditional arts and skills, greater social cohesion, all of which can be drawn out from interviews with local people.
- *Level of visitor satisfaction* Information on visitor satisfaction levels will help to reveal what tourists appreciated most and what they liked least, whether their expectations had been met and whether they intend to return for another holiday to the same destination. Also, whether any quality standards or labels affected their choice of destination or individual activity.
- *Marketing success* Finally, the successes and failures of the marketing strategy should also be given full consideration. Details of how tourists found out about the holiday, why they decided to choose this particular destination and how they organised the logistics of their trip in terms of choice of accommodation, reservation, transport, etc... will help to determine whether the marketing strategy is performing as expected

Measuring impacts

Once the annual statistics and occasional surveys are complete it will be important to make these readily available to stakeholders. This will help them to keep up to date about the performance of the destination as a whole, and to consider any individual adjustments they may need to make to their own individual facilities, in order to adapt to changing needs and opportunities.

## 9.4 Stress indicators

Early warning mechanism

Stress indicators are the third cornerstone of a monitoring programme and serve to complement the basic tourism statistics and the dedicated surveys by introducing an early warning mechanism into the process. Essentially, this involves finding certain key trigger factors, which can be easily monitored. If these are activated

then it will send a signal that it is time to carry out a more detailed investigation. The European Commission has recently published a report on early warning systems for tourism destinations which is worth consulting (see Commission website at back of publication)

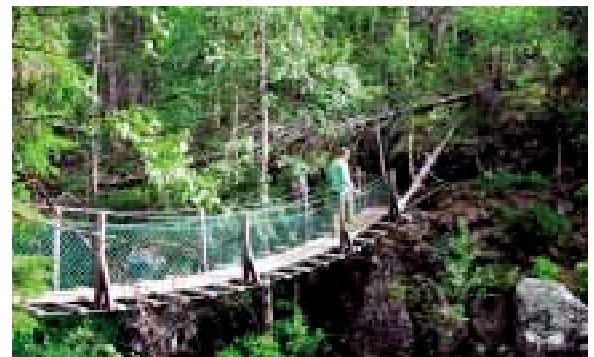
### ■ *Environmental indicators*

For tourism that is based on natural and cultural heritage, environmental stress indicators are essential. Even with the most carefully thought out facilities, it is not always possible to predict the impact of tourism on the environment. It is therefore important to be able to spot negative trends or impacts early on in order to be able to respond to these concerns before they become real problems.

*Trigger factors*

The kind of impact will depend on the type of activities being undertaken but generally include a wide range of factors from water and waste pollution to trampling and disturbance of wildlife. The significance of the effects will depend in turn on the vulnerability of the environmental features concerned and on the intensity of use. Possible environmental stress indicators should be devised in function of these concerns. For instance, in the case of water and waste pollution regular monitoring of water quality will help to reveal any changes in pollution levels. For habitats, along a trail for instance, erosion and visible degradation would be obvious stress indicators.

In all cases it is also important to establish a link between the environmental impacts and visitor density (volume of visitors over the year), intensity (maximum number of visitors in a given time) and activity (consumptive/non-consumptive, passive/ active). This will help to determine the visitor levels and patterns that can be tolerated by the environment without significant damage. A benchmark for these carrying capacities will already have been estimated during the development phase of the tourism strategy. Now is the time to test whether these estimates were correct or whether they will need to be revised upwards or downwards.



### ■ *Indicators of visitor satisfaction*

Psychological stress indicators provide an early warning system for reduced visitor satisfaction levels. If tourists are less than satisfied with their visit, they are unlikely to come back or recommend the place to others. Eventually, the overall number of visitors to a particular attraction will drop as word gets around that it is 'not worth going to'. Stress indicators need to be devised in order to catch these problems early and to determine why it is that the levels of satisfaction are lower. Common causes can be traffic congestion within the area, overcrowding at particular attractions, loss of authenticity in the events and facilities, and a general over-commercialisation of the destination and its resources.

The easiest way of picking up on these stress indicators is to provide visitor books or suggestion boxes, which gives the tourists a chance to record spontaneous comments and reactions to the facilities. If the number of negative comments increases then it is time to do a more complete survey.

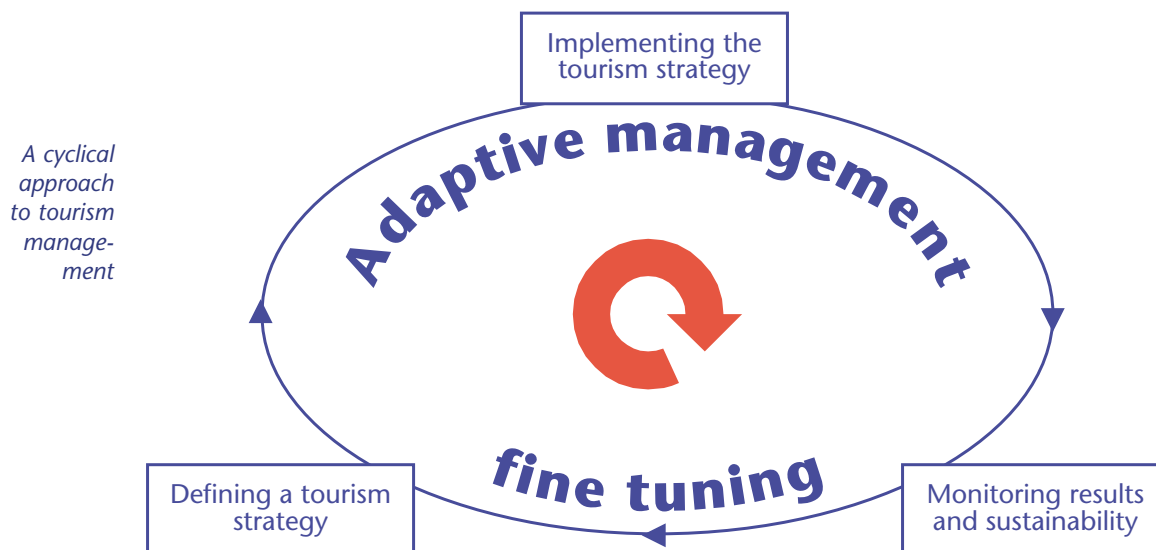
### ■ *Social indicators*

Finally, stress indicators also apply to local residents but obvious trigger factors are rather harder to identify for this group. Two possible signals are an increase in negative reports in the local media and/or a change in the ratio between the number of tourists and the number of residents. According the World Tourism Organisation, if the ratio exceed 1 then it is likely to lead to problems and possible conflicts.

## 9.5 Adaptive management responses

These three monitoring techniques: stress indicators, tourism statistics, and dedicated visitor surveys will provide all the necessary feedback to be able to work out a suitable management response. Some issues may be straightforward to tackle and are related only to an individual attraction or service. Others may be more complicated and may require a more coordinated response from all stakeholder groups involved, and even a possible change in policy. This may happen, for instance, if the destination as a whole has reached its carrying capacity.

This is where the feedback loop is so important as has been stressed throughout this publication. Only by respecting and using this cyclical process will it be possible to ensure that the tourism destination remains sustainable and dynamic.



# Glossary

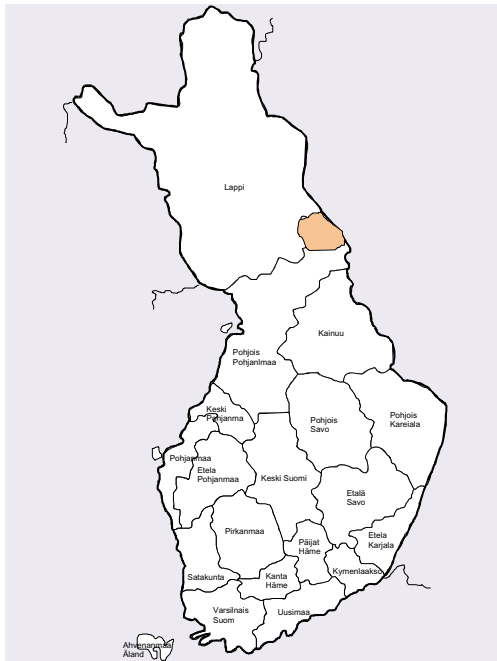
- **Heritage:** involves two factors: a sense of *belonging* i.e. a form of heritage that is inextricably linked to the area in question and has a clear association with it. It also involves a sense of *time*: i.e. one that is based on the history or geography of the place and that has been passed down through at least one generation.
- **Natural heritage:** is taken in its broadest sense and covers not only the wildlife and habitats of a particular area, whether protected or not, but also its geological features and landscapes/scenery.
- **Cultural heritage:** encompasses any cultural expression transmitted from the past and inherited by the present day society. This can take on a material form, such as a structure or building, or, as is more often the case, an immaterial form such as tradition, know-how, lifestyles, customs, ...
- **Sustainable tourism:** meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems.
- **Eco-tourism:** all forms of tourism which the tourists' main motivation is the observation and appreciation of nature, that contribute to the conservation of, and that generate minimal impacts upon the natural environment and the cultural heritage.
- **Non-traditional Tourism Destination:** a destination that is currently less frequented by tourists. Based on Eurostat tourism statistics this represents a NUTS III region calculated with a visitor density of 158 or less nights spent per km<sup>2</sup> per year in hotels and similar establishments and tourist campsites.
- **Market segment:** refers to specific type of tourism that attracts a specific type of tourist, for instance nature tourism, cultural tourism, health tourism, sport tourism.
- **Integrated Quality Management:** is an approach which simultaneously takes into account, and has a favourable impact on, the activities of tourism professionals, on tourists, on the local population, as well as on the environment. The IQM strategy implemented at the destinations has the requirements of tourists as one of the major considerations.
- **Vernacular architecture:** relating to, or being the common building style of a period or place.
- **Benchmarking:** the study of a competitor's product or business practices in order to improve the performance of one's own company or product.
- **Carrying capacity:** the level of visitor use an area can tolerate with high levels of satisfaction and little impact.
- **Sustainability Indicators:** are measures of information with which decision-makers reduce the changes of unknowingly taking poor decisions.
- **Tourism supply:** relates to all that is put on offer to tourists within a destination be it facilities or services.





## Case Study 1

# KUUSAMO Finland



*A region that has focussed on year round nature orientated tourism in small groups with a strong emphasis on developing a quality product of a high environmental standard*

## The area

Located in the north west of Finland one hour's flight from Helsinki, the region of Kuusamo has many natural attributes to be proud of. The first is its topography, these are the first mountains one sees when coming up from the south. They may only be 500m high but thanks to an almost guaranteed abundance of snowfall in spring they have become very popular for winter sports.

Then there is the spectacular scenery: the variation in altitude creates a diverse and dramatic landscape composed of fast running rivers, placid lakes, ancient primeval forests, deep canyons and gorges through which waterfalls cascade. This landscape continues for miles giving the impression of a real wilder-

ness, further reinforced by its situation along the Russian border.

The wilderness element is also reflected in the presence of a wide range of species and habitats. Over 30 mammals are to be found here including the bear, wolf and wolverine, and around 120 bird species have been recorded. It is in many respects an ecological 'hot spot' where arctic species meet those from the more southerly climes and Siberian wildlife rub shoulders with that more commonly found in the Atlantic regions.

It is not surprising therefore that the area has long been coveted for its natural values and that parts of it were declared a National Park as far back as 1956. Extending over 260 km<sup>2</sup>, the

Oulanka National Park is well known to many Finns, not only because of its spectacular scenery but also because it has one of the most famous hiking trails in Finland, known as the Bears ring. Not for the fainthearted, this trail runs for 75 kms and takes 5 days to complete. As a result there is a certain kudos associated with being able to say that one has 'done' this trail.

The area has therefore attracted a small number of tourists for a long time. But apart from private efforts to develop downhill skiing at the resort of Ruka relatively little had been done to promote or facilitate tourism within the region as a whole. As a result, until 10-15 years ago tourism functioned only as a concentrated economic activity over a short period of the year.

This is not helped by the fact that Kuusamo is sparsely populated. There are only 18000 inhabitants in an area covering 5800 km<sup>2</sup> - and 65% of them live in the main town of Kuusamo. The municipality and public forestry authority are the main employers. By contrast, only 11% of the workforce is involved in primary production. This is essentially small scale farming, mostly concentrated on reindeer herding (there are almost as many reindeer as people here).

Yet, the tourism potential is significant especially in view of the recent trends towards more nature orientated activities. Seeing this potential, a number of private companies began to develop activities for small groups of tourists such as cross country skiing trips, snowmobiling, dog sledging, white water rafting, guided hikes to name but a few.

Originally, these began as a means of diversifying the tourism offer at the ski resort of Ruka. With time a whole range of products was developed for the whole family to enjoy. But the process was essentially an opportunistic one and highly dependent on local service providers' business acumen. It was also totally dependent on the ski resorts'

ability to attract tourists for skiing. There was at that stage no overall vision or strategy for tourism development in the area as a whole.

Recognising the central role the National Park could play in this process, the authority responsible for its management – the National Forest and Park Service – decided to join forces with the local municipality and investigate the current levels of tourism use, expectations and expenditure in and around the National Park.

Kuusamo vital statistics	
Area:	5800 km <sup>2</sup>
Population:	18,600
N° tourists:	1 million
N° bedplaces:	2000 hotel beds
Average length of stay:	1-2 weeks
Seasons:	Early spring and summer
Tourism revenue:	72.6 million €
Visitor profile:	Families, individuals
Nationality:	Mainly finnish

This revealed some interesting facts and figures which had not been fully appreciated until then. It also gave the Forestry Service a means of initiating dialogue with the local tourism businesses and other interest groups in order to develop a shared vision of how tourism could be further enhanced in a sustainable manner, and how the National Park could play a role in this process.

At first this initiative met with suspicion. The forestry service was after all the main land owner in the area and national parks are often associated with restrictions and prohibitions. But as the surveys unfolded and more and more meetings were held to share views and ideas, it became increasingly apparent that there was a lot to be gained by working together on a common strategy.

It was also clear that, in order to be effective, the tourism strategy needed

to be integrated into other policy developments for the area in order to re-enforce its impact (like segments within an orange) and make the best use of very limited resources.

An overall vision emerged which gave the interest groups associated with tourism in the area an objective to work towards. It was concluded that the level of tourism (1 million a year) was satisfactory but too narrowly concentrated on one area – the ski resort of Ruka. So rather than encourage more tourists to come which could have negative effects not only on the environment but also on the social and psychological perceptions of the tourists themselves, attention should focus instead on developing and expanding the possibilities for the existing tourism base to explore other parts of the area and to visit them for their intrinsic value rather than as a add on to a winter skiing holiday.

The intention is therefore to encourage people to stay longer in the area, return regularly and visit at different times of the year rather than just during the short skiing season. It was felt that would be much more appropriate for the local economy generally as it could not only create year round employment (instead of just seasonal work) but also provide an avenue for certain secondary products and activities such as local food and handicrafts which could be developed around tourism. A target was therefore set to increase the tourism revenue from € 73.5 million to close to € 100 million in the space of five years whilst only marginally increasing the number of visitors, and then focussing strongly on the foreign market.

The businesses, National Park and municipality all realised that this meant developing a quality product that was of an environmentally high standard. A number of different measures were used with a considerable success to achieve this. The following provides an overview of some of these.

## Role of the National Park

Early on it was recognised that the National Park had a central role to play in this process. Its primary role is clearly to conserve the high natural assets of the park but this does not mean the



area has to be 'out of bounds' for visitors. On the contrary, with careful management, the park can provide numerous opportunities for tourists to enjoy the pristine nature, dramatic scenery and tranquil setting of the area. This in turn acts as a magnet to attract tourists to Kuusamo in the first place and improves the overall image of the area. As the visitor surveys showed, many tourists are attracted by the fact that there is a National Park even if they never actually visit it during their stay (15% of visitors to Kuusamo go to the National Park but 65% are attracted by its presence).

From the tourism industry's perspective there is the added advantage that good cooperation between the national park and the different service providers means a reduction in investment costs for them and increased opportunities for nature related activities. For instance, Oulanka NP has developed four nature trails of varying length for hikers. These range from the long 75 km bear ring trail which is famous throughout Finland and aimed at the serious hikers, to shorter trails which can be completed in one to two days



and are therefore more suitable to the more casual walker.

Along each of these trails the Park authorities have installed additional facilities for the tourists, such as wilderness huts, campfire sites, camping areas, Lappish kota huts, suspension bridges and viewpoints, canoe loading stations to name but a few. These are regularly maintained by the park wardens and kept to a high standard.

Then there is the Parks' visitor centre which is strategically located on the only road that leads in and out of the park. Visitors are encouraged to stop here to pick up information on the different activities that are possible in the area and on the companies who can provide a variety of packages or services for tourists (eg rental of canoes, hiking tours, white water rafting etc...). At the same time they are able to learn about the natural wealth of the park and why it is so important to conserve this for future generations. As such it acts as a sort of honey pot for the park from which people radiate out in increasingly small numbers.

This is where the 'return on investment' kicks in. By providing these facilities the park is not only able to ensure that the activities undertaken are compatible with the natural environment but it also

raises the overall level of environmental consciousness amongst the tourists and increases public support for a national network of protected areas.

In terms of ensuring that the natural environment does not suffer as a result of tourism activities, the national park has instigated a number of measures. The first is of course related to the routing of the nature trails to avoid sensitive or fragile areas. Thus, despite having over 150 kms of trails through the park, tourists are still channelled through only a very small proportion of the whole area. By providing additional facilities such as wilderness huts people are encouraged to stick to the trails rather than create their own ways. Also, the facilities add a further environmental dimension eg through the use of ecological loos, ready cut firewood, bins etc

Because these are regularly maintained, the wardens are also able to keep a close check on visitor use. This relates equally to the environmental, social and psychological capacity. In all cases regular monitoring provides an early warning system for tell tale signs of damage or lower visitor satisfaction levels which can be addressed before they become serious problems.

The psychological carrying capacity is particularly important since a careful balance has to be struck between facilitating people's enjoyment of, and safety within, the park whilst at the same time fulfilling their expectations in terms of scenery, tranquility, adventure and sense of wilderness. This is quickly disrupted if any of the facilities become overcrowded or degraded.

## Licences for environmental operators

Because the National Park attaches so much importance to these aspects and has a high public profile there is a strong interest on the part of local busi-

nesses and service providers to use the facilities of the park for their own activities (canoeing, hiking, cross country skiing, etc...). These activities are not only likely to bring in additional revenues and jobs to the local economy but also help to create local acceptance for the park and its conservation objectives. So there are good reasons for the park to cooperate closely with tour operators.

But to be effective and durable it has to work both ways – the park helps to increase local tourism businesses but the businesses must then help to maintain the natural environment and raise awareness for its conservation needs. With this in mind the Park Authorities decided to introduce a license system for businesses that wanted to operate in the park. Thus, the businesses are asked to declare what activities they want to do where, report back at regular intervals on the number of tourists and services provided and undertake a short educational course run by the park on nature conservation issues.

In exchange, the park not only allows them access and use of their facilities but also gives them a form of visible accreditation such as a badge or logo. These companies can in addition advertise in the visitor centre, and create a direct link from the national park's website. So far 5 operators have signed up to this scheme and more are showing an interest to join as they see the benefits it can bring to their competitors.

## Environmental consideration throughout

Because over the years there has been a strengthening of dialogue between the park authorities, the municipalities and the local businesses, this form of cooperation has extended beyond the borders of the national park. Recognising that the 48 service providers currently in operation in Kuusamo would greatly benefit from additional trails for their activities outside the fragile confines of

the Park, the municipality agreed to help develop a network of trails within the region.

Each partner had a role to play: the state forestry board allowed access onto their land, the ecologists from the national park helped to choose the routes to ensure the least risk of environmental damage and the businesses provided information on what was likely to be of most interest to the tourists.

The final outcome was impressive: altogether 500 km of cross country skiing trails, 600 kms for snowmobiles, 600 km for bicycles, 350 kms of rivers for canoeing and 100 km of hiking trails were developed. The partnership approach is further demonstrated by the commitment of all three interest groups to pay a share of the costs of an independent local association to maintain these trails (hence supporting further local jobs).

## Small group adventures

The service providers themselves also have a central role to play in the development of sustainable tourism in the area. They are after all the main tourism income generators in the area. Their approach is interesting in that it caters essentially for small groups with the emphasis on a personalised service and quality products. They also take care of everything from accommodation and food, to equipment and guided excursions.

Because many of the nature activities being promoted (such as canoeing, whitewater rafting etc...) require specialist equipment and an in-depth knowledge of the area, these tours have become increasingly popular.

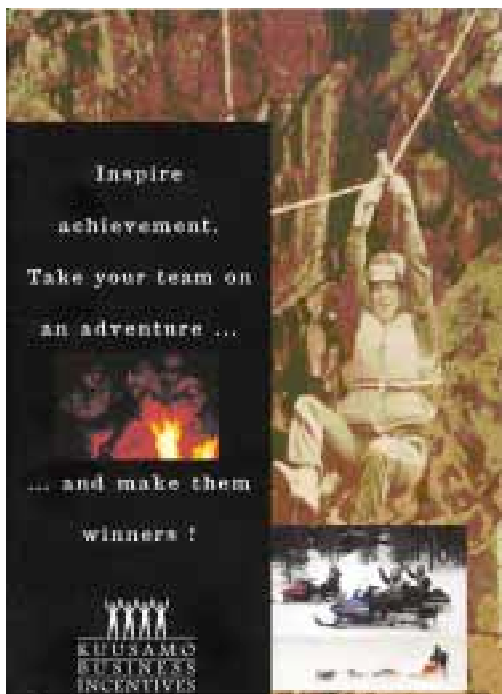
Part of the success is due to the fact that:

- they allow the tourists to do and see more than would be possible on their own,

- they provide an important element of safety in a dangerous environment,
- they provide a personalised service that puts the tourist at the heart of the activities;
- and they give a unique insight into the local lifestyles and natural riches of the area (eg by serving up local products using local recipes and imparting knowledge about the areas' wildlife)

Together these help to provide the tourist with a memorable experience. Thus, groups have rarely more than 10 people. Also because there is a good collaboration between the businesses themselves, larger groups can be split up and catered for without there being a risk of over crowding.

A number of business have found that this sort of set up is ideal for business incentive tours as well. Here the emphasis is on facing challenges, developing leadership skills and team building. An overnight camping trip to the Russian frontier by snowmobile in the dead of winter when it is dark for 24 hours a day and minus 20°C does a lot to foster a sense of adventure and team spirit.



It is also financially very rewarding for the service providers.

Their approach of offering a very personalised package marries very well with the local infrastructure and environment and provides a lucrative business for a significant proportion of the SMEs in the region. This is because it provides a mechanism for planning and spreading tourism effectively whilst at the same time ensuring that any negative impacts both on the environment and on the tourists are avoided at the outset or then dealt with rapidly before them become intractable problems.

## Branding

The question then turns to how this overall product is marketed. With 48 small businesses and such a wide range of different activities it would be all too easy to dissipate the tourism interest. Therefore, what was needed was a strong branding message for the area as a whole and an easy means of access to information about the different attractions available.

This is where the municipality steps in. Their marketing research revealed that Kuusamo had a number of important characteristics that could be used to create a strong brand. The first most obvious is that it has four very distinct seasons, each one of which has the ability to appeal to tourists. In winter there is the perpetual darkness of the polar night with the aurora borealis, spring brings with it an abundance of snow and bright evenings whereas in summer the sun never sets and temperatures float around a pleasant 20°C (compared to -20°C in winter). Finally, autumn is the season when the forests change colour and the whole area glows spectacularly with tints of red and yellow.

Taking the two extremes of summer (perpetual sun) and winter (perpetual night) a brand was developed around this contrast using the already famous

Ruka ski resort to represent winter activities and the Kuusamo wilderness (in particular the National park) to represent summer outdoor activities.

This message is intended to encourage people who enjoyed their stay during one of the seasons to come back at another time of year when they would be promised an altogether different but equally rewarding experience.



The objective of encouraging tourists to visit and return at different times of the year was further enhanced by the development of a series of high profile events to draw attention to the area. This included for instance a national photography exhibition in September, a bird-watching marathon in May or an international snowboarding competition in Spring.

Finally, because of the low population densities and large distances communication is not as straight forward here as it would be elsewhere. So to advertise the area as a whole and provide tourists with easy access to the different facili-

ties, the municipality developed a comprehensive dedicated website about the region. This is both in Finnish and English and provides information about an otherwise 'remote' region at one fingertip.

Finally, another important element in the marketing and profile raising of the area has come from its networking with other interests on a wider scale. The municipality has for instance associated itself with the network of Lapland tourism associations which work together to promote the image of Lapland on an international arena. Although Kuusamo is not strictly speaking in Lapland it has many features in common with this area and can therefore benefit from a joint marketing approach.

In addition the Oulanka National Park is associated with the World Wide Fund for Nature's Pan Parks initiative. The objective is to create a network of high profile national parks across Europe who have built up a reputation for marrying strict conservation principles with developing quality tourism products. In time this label could also help to draw attention to the Oulanka National Park and promote further the image of the whole area.





## Case Study 2

# PAYS CATHARE France



*A region that has launched an ambitious rural regeneration programme using its historical past to develop quality based cultural tourism in the 'hinterland' of the Aude*

## The area

Located in the south of France, the Aude is first and foremost known for its Mediterranean coastline and for the beautiful walled city of Carcassonne, which is a World Heritage Site. Both have been magnets for tourists since the 1970s and feature prominently in the promotions of the area. As the traditional base of the tourism economy, they rightly receive a lot of attention from the public authorities and commercial interests involved in the industry. But there is more to the Département of Aude than these two tourist attractions.

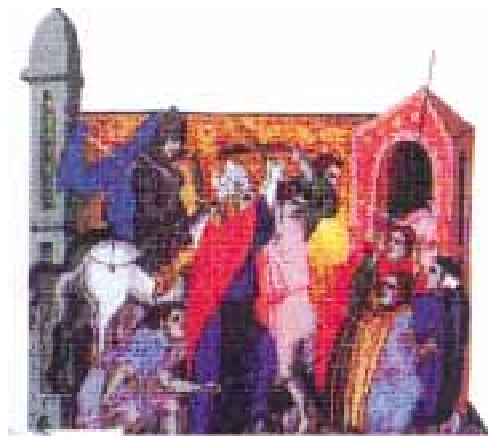
Covering altogether 6.139 km<sup>2</sup> and hosting a population of 309,600 the so-called 'hinterland' of the Aude is steeped in medieval history from the Cathare period. Many relicts of these

troubled times remain scattered amongst the scraggy hill tops and strategic outlooks. The landscape is correspondingly 'wild' with large areas of Mediterranean forests and 'garrigue' (a kind of scrubland), and an impressive array of rare animals such as the imperial eagles.... Interspersed amongst this nature are small hamlets and villages and extensive vineyards. This is after all the land of the Minervois and Corbières wines.

Until recently little was known about this part of the region and even less was done to promote it as a tourism attraction in its own right. Yet with such an influx of tourists already attracted to the Aude, the potential for developing new tourism products in the rural 'hinterland' could not be better.

There was an economic imperative to do so too. Like many parts of rural France, the Aude suffered from désertification in the 1970s and 80s as people moved from the countryside to the thriving urban areas of the region and beyond. Also the main stay activity of wine making suffered badly in the mid 1980s and required a significant and painful overhaul to remain economically competitive.

Recognising the need to diversify and revitalise the local economy the Conseil General (public authority for the Département) and civic leaders launched an ambitious programme of rural regeneration based on cultural heritage and tourism promotion: the Pays Cathare initiative. This began in the late 1980s and had great impact on the rural parts of the Aude, transforming many communities. It illustrates many highly effective techniques of using cultural resources for economic gain.



## Cathars, Castles and Culture

The mortal world is a kind of hell on earth where evil reigns. Goodness and knowledge of the divine nature of man's soul can only be achieved by detachment from the material world. This is the philosophy of the Cathars (also known as Albigensians or Manicheans) a religious sect that flourished in the Languedoc in the south of France from the 12<sup>th</sup> century. In this land of dazzling culture and

*troubadours*, the people spoke Occitan and practised freedom and tolerance, allowing the Cathar religion to flourish despite its excommunication.

But this hayday was cut short once Pope Innocent III had declared a holy crusade against the Cathars in 1208. This began a terrible and bloody war as armies invaded the Languedoc in search of material and spiritual gain. The crusading armies under Simon de Montfort, with religious support from St Dominic and the Inquisition, massacred the Cathars and seized their lands. When Bélibaste, the last of the "Perfects" (the Cathar élite) was burned at the stake in Villerouge-Termenès in 1321, Catharism was finished.

The most visible symbols of its legacy were the castles, many subsequently re-fortified to defend France on its frontier with Aragon. These were built on spectacular sites, mainly mountain peaks in the area. Cathar heritage was kept alive by scholars but was not part of the popular imagination. Indeed, to many it had negative connotations, symbolising dominance by Paris, defeat and suppression of the culture and language of Languedoc. Some were more interested in the castles as sources of building stone than historic monuments.

Towards the end of the 1970s a book by Michel Roquebert and a television series awakened interest in the history of the Cathars and people began to visit what was left of the Cathar castles. At the same time, there was a general trend to move back to rural areas, mainly to seek a different way of life from the cities in the aftermath of the Paris riots of 1968. Some towns began staging cultural events to revive rural life.

But the economic base of the *département* was eroding. Manufacturing industry and mining contracted. In the face of a severe slump in sales, viticulture had to restructure by replacing poorer quality vines and reorganise wine cooperatives. Responding to this crisis, the mayor of

Villeroque-Termenès, Eric Andrieu, a member of the *Conseil Général*, rejuvenated by the policies of decentralisation in France after 1982, brought together representatives of the towns and villages interested in developing tourism based on cultural heritage. The *Pays Cathare* project was born.

## Mobilising local Resources

The *Conseil Général* commissioned market research and feasibility studies of the Cathar heritage sites from 1987 to 1989. These confirmed that there was a real tourism potential for the Cathare region. After the first meeting of the potential Cathar communities the *Conseil Général* went to work in securing secure sufficient backing for a comprehensive and long-term programme, inter alia through Objective 5b funding.

A basic principle was consultation and involvement of the inhabitants of the towns and villages which were potential tourism growth poles. Because some of these were very small, with only around 200 inhabitants in some cases, resources for training, marketing and physical development of sites and build-

needing a great deal of time and work on the part of *Conseil Général* officials and members, but their perseverance has begun to pay dividends for those rural localities who have secured economic gains compatible with sustainable development.

This community-led approach was matched by the use of technical expertise. The *Conseil Général* is the main backer of the *Centre d'Études Cathares* in Carcassonne. This institution is the definitive authority on Cathar history and is available to both public and private sectors. Using its expertise ensures the authenticity of ventures based on the heritage of the Cathar era. As well as the public authorities involved in the main Cathar site developments, recent commercial initiatives, the *Catharama* and the *Imaginarium*, used the centre even though they were not part of the *Pays Cathare* programme. Still, they play a part in the tourism offer, generate income and employment and make a cultural contribution by helping to stimulate interest in the historical theme.

Finance was essential to mobilise the programme. The local authorities and national agencies used the Leader I and II European Initiatives effectively. The Leader local action groups in the Aude recognised the *Pays Cathare* project as having the most potential for rural regeneration and decided to concentrate resources on supporting its implementation. Leader I provided €3.2 million for the 10 communities taking part in the first phase of the *Pays Cathare* project in 1992-93, one third of the total cost.

This close identification between the Leader Initiatives and the *Pays Cathare* programme gave locals confidence that ideas would be realised through availability of funding for marketing, product development and training. It also allowed project promoters to try out their ideas and learn from counterparts in Spain and Italy. This commitment of support was decisive in generating an

Pays Cathare vital statistics	
Area:	6,139 km <sup>2</sup>
Population:	310,000
N° tourists:	+/- 120.000
N° bedplaces:	3000 excl camping & holiday cottage
Average length of stay:	1 week or more
Seasons:	Summer
Tourism revenue:	Unknown
Visitor profile:	Mid age couples
Nationality:	82% French

ings were essential. This meant involving national agencies, the private sector and Chamber of Commerce in the process from the very outset.

This partnership approach was maintained throughout the programme,

essential momentum for the Pays Cathare project in its early years.

With ideas originating in the communities, and tourism experts highlighting opportunities, and possible sources of funds, the next step was to devise and implement a strategy



## A Strategy for Sustainability

Three complementary aspects of the strategy were launched in parallel to produce an integrated programme that would be sustainable and maximise local benefits:

- Development of growth poles, where a major site or building of the Cathar era would be prepared for visitors and marketed as part of the *Pays Cathare* programme. Each village would simultaneously develop an attraction of its own to draw visitors in and to encourage them to stay longer.
- Development of the *Pays Cathare* quality mark through an association of *Pays Cathare* sites, represented by the municipalities, and professional associations in specific trades. These associations work under the aegis of the *Conseil Général* to set and monitor quality standards.
- Territorial development, whereby local initiatives are nurtured by local

development agents, who then secure supporting resources.

Of the 3 strands, only the growth poles are directly concerned with Cathar history. The quality mark and territorial development aspects are techniques of local development using the interest generated by the Cathar heritage promotion to boost community regeneration based on a range of ideas and resources in the rural areas of the Aude.

## Growth Poles

As part of the original consultations, the municipalities and Conseil Général agreed criteria for designating the key sites of the programme. These included commitment by the municipalities, use of the academic support to ensure genuineness, assessment of the market potential of the sites. Curiously, the original selection included attractions that were not strictly part of the Cathar heritage but all were of historic interest. Market potential and local commitment were the dominant considerations. Even though the Aude's neighbours declined to take part, thereby removing important Cathar sites such as Montsegur and Foix, there was enough mediaeval heritage to provide a powerful network of attractions, originally 7 sites.



Market potential and local commitment were the dominant considerations. Even though the Aude's neighbours declined to take part, thereby removing important Cathar sites such as Montsegur and Foix, there was enough mediaeval heritage to provide a powerful network of attractions, originally 7 sites.

By 2001 the *Pays Cathare* Association of Sites had increased to 14. These have joint promotions and a ticketing discount system to encourage visitors to explore more than one site and consequently to stay longer in the area.

This growth pole concept is clearly working. The most popular castles welcomed almost 100,000 visitors each in 2000 and tourists are spending money

in the villages, providing income and employment. Tourism operators are developing viable products and the local authorities are able to sustain employment at their attractions.

If anything there is now a bottleneck as a result of this success. Despite the continuing influx of tourists, the accommodation sector has not been able to keep up so at certain peak times there is a severe shortage of bed places which not only shortens people's stay but also discourages more organised specialist tours from 'doing the cathar route'. Finding 10 hotel rooms in one town is still a difficult feat.

Much of this problem is caused by the fact that the villages are now essentially made up of older people who do not want to launch themselves into new ventures and initiatives. This is one of the big problems many rural areas have to grapple with.

## Territorial Development

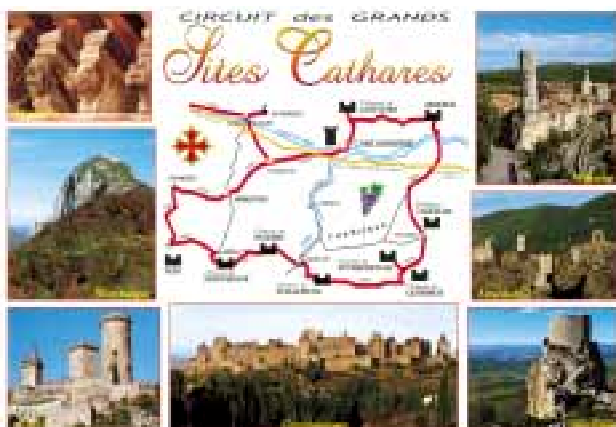
The Aude is sparsely populated apart from the few main towns and the coast. An idea that emerged in the first Leader local action group was to introduce development agents into these communities. This is an exercise in active, participatory democracy. The job of an agent is to stimulate the creation of new projects that brings life to the towns, villages and countryside and find ways of making them work. Their remit

is wide, covering any kind of development that locals think appropriate, whether a cultural initiative, building construction or renovation, environmental schemes and business development. The *Conseil Général* contributes to the costs of the posts for the first year, after that the municipalities or groups of municipalities have to take over.

The work of a development agent typically begins with an analysis of the needs of the local community and a SWOT (strengths, weaknesses, opportunities, threats) study, involving formal and informal consultations with the people living in their area. Then they research the potential of ideas emerging from individuals and groups, refine the proposals and where appropriate seek specialist advice. Identifying sources of finance for project development is also a priority.

The end result is production of a local development strategy, which they have to implement.

This is of course not always as straight forward as it may seem. As stated before many villages have lost a large part of their population, and with this went much of their dynamism and willingness to embark on new ventures. Rural development is therefore necessarily a slow process but as the Mayor of Lastours points out he now has 6 children in his village, it's a small beginning but psychologically a very important one.



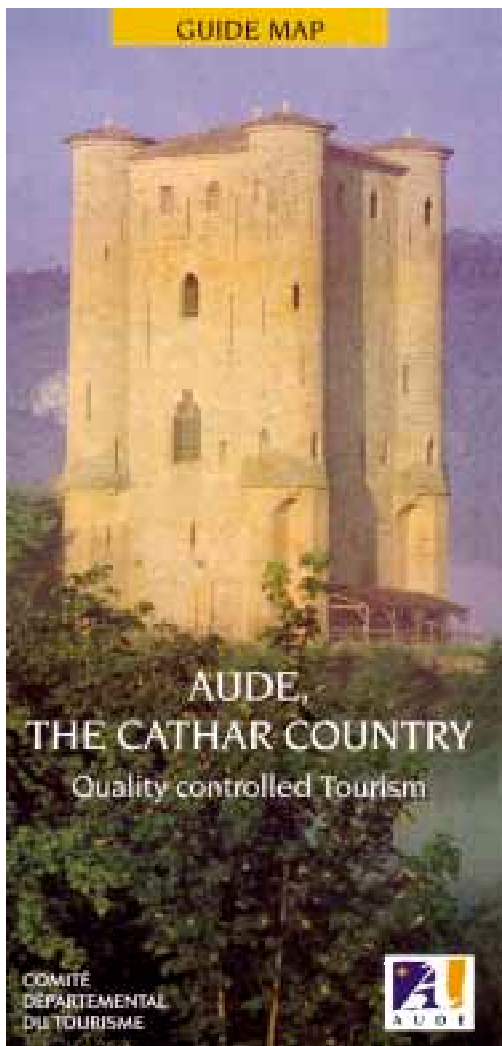
To support this work the *Conseil Général* started a programme in 1989 to produce an inventory of cultural heritage in the rural areas of the Aude, subdivided into 9 zones. It used funding from Europe, under the Objective 5B measures and is seeking support under FEOGA (agriculture) for the future. These inventories, now 7cm thick dossiers, are available to all but are particularly useful to the development agents and the Conseil in its overall strategic planning.

## The Pays Cathare Quality Mark

This takes the *Pays Cathare* project into the field of commercialisation. The idea is to use the logo as evidence that the product or service is local and of an approved quality. This concept was the highlight of the second Leader initiative in the 1990s. Promotion of the quality mark aims to increase customers for those entitled to use it. If the idea succeeds, customers will buy with confidence when they see the mark and the Aude will earn a reputation for quality.



The *Conseil Général* is a committed promoter of the idea. It owns the logo and its staff spend a lot of time on this part



of the programme. By 2001 it had a lot of adherents, 650 enterprises in 21 designated sectors. The professional groups in each sector, some already existing and some newly formed, decide on the quality criteria applicable and have them validated by the *Conseil Général*.

All companies receiving the quality mark have to attend a training course on the *Pays Cathare* project and have access to specific training courses organised by the Chambers of Commerce in the Aude, which enthusiastically support the quality mark idea. This training provides skills in entrepreneurship, business management and marketing. It is a proven method of helping business start-ups, as delivered by different agencies in different European countries.

In the Aude, the promotion of the quality mark is an efficient way to encourage companies to take advantage of this training. This is an important achievement. It outweighs any confusion about the meaning of the Pays Cathare emblem itself, whether it is simply a quality mark for enterprises in the Aude in a whole range of sectors or whether it is a link between the Cathar heritage and those entitled to use it in business. While the *Conseil Général*, Chamber of Commerce and businesses might have different ideas about its meaning, the quality mark is definitely improving business competitiveness in the Aude and at the same time enhancing the overall tourism product. Reputation based on quality products and services have an increasingly important role to play in the durability of main tourism destinations, especially those that focus on natural and cultural heritage in rural areas.

## Quéribus and Cucugnan

The success of the different aspects of the Pays Cathare project is exemplified in the village of Cucugnan, in the south of the *département*. With a population

of just over 100, by the 1980s Cucugnan had little to sustain itself apart from wine production, and this was in a pro-



cess of restructuring. Next to the village stands the castle of Quéribus, strikingly situated on a mountain peak but still easily accessible.

The castle is one of a chain in the Corbières, once Cathar strongholds rebuilt by French kings and now well-preserved monuments. It was an obvious candidate for inclusion in the programme as a growth pole but what about a complementary attraction in the village?

The answer came from a story familiar to all French schoolchildren, the *Sermon du Curé de Cucugnan*. This was popularised by the writer Alphonse Daudet, based on an original poem in Occitan by Achille Mir. Although purely imaginary, the story gave the village a claim to fame. The municipality decided to build a theatre and stage an animation of the tale as a tourist attraction in 1994.

The development of the Little Theatre of Achille Mir brought together two facets of the overall project, the growth pole with twin attractions and the work of the development agents. The agents also promoted environmental improve-

ments in the village and helped business to start up. By 2001, there were two hotel/ restaurants (one an adherent to the Pays Cathare quality mark) an outlet for a local wine cooperative, several *gites* and *chambres d'hotes* and a fair sprinkling of craft shops.

The castle and theatre employ 6 people year round with around 20 making their living from tourism in the private sector. Visitor numbers to the castle and village increased dramatically, from 500 in 1970 to 7,000 in 1980 and 88,000 in 2000. Families with young children are now living in the village again.

For the future the partners in the project intend to floodlight the castle, adding night-time visits, restore the ruined windmill and carry out an archaeological excavation. Quéribus and Cucugnan have advantages because of their location, not far from the popular coastal resorts and near other Cathar castles, mountains and the river gorges. But the villagers have taken full advantage of their location and of all of the resources of the Pays



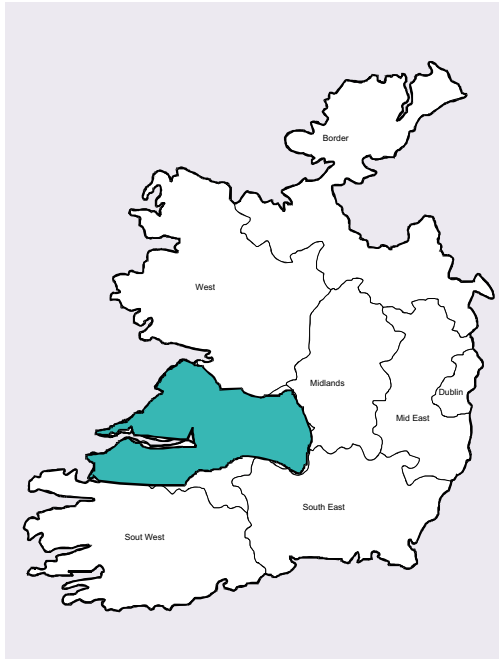
Cathare project, using all of the supporting resources available. Cooperation with the nearby castle and village at Peyrepertuse will add to the marketing advantage by creating a cluster of attractions, especially if Duilhac-sous-Peyrepertuse can emulate a village tourism venture to match Cucugnan.





## Case Study 3

# SHANNON Ireland



*A region that developed sustainable tourism based on its cultural and natural resources by combining strategic direction with the nurturing of individual and community initiatives.*

## The area

The Shannon region has become known in local tourism parlance as the “green heart of Ireland”. It is essentially a rural area spanning 10,000 km<sup>2</sup> and made up of low lying fields, hedgerows and winding country lanes interspersed from time to time by peat bogs, meandering rivers, indigenous forest and modern coniferous plantations.

The landscape is not spectacular but it is in many respects very typical of this part of Ireland. There are also one or two scenic highlights of note such as the Burren - one of five national parks in Ireland, the cliffs of Moher and the Shannon River itself.

More noticeable is the architectural heritage, which is everywhere, predominantly dating from the mediaeval era

(churches, abbeys and castles....) History is an important part of tourism in Ireland. The legacy of the past, from the stone age through the Celts, Vikings, Normans to the struggle for independence from Britain, is preserved in historic sites, buildings, music and literature.

In Shannon the living culture is also very strong, Clare is renowned for its music and North Kerry for literature. But despite these assets, little was ever developed to attract tourism to the area. Also certain towns, like Limerick had developed an unattractive image, not helped by Frank McCourt’s best selling account of his childhood there in *Angela’s Ashes*.

Thus, few people would consider actually staying in Shannon for their holiday,

preferring instead to head for neighbouring regions famous for their scenery and heritage, to the south (Cork) west (Dingle and Killarney) and north (Galway and Connemara).

At least that is how it used to be until a new initiative was launched in the 1990s. Now tourism is a mainstay activity for Shannon, attracting almost 2 million visitors a year and bringing in around €400 million. This case study explores some of the reasons for this success.

## Strong leadership

Early transatlantic air travel guaranteed Shannon an important source of revenue. Long-haul flights between Europe and the US used to stop here for refuelling, and as a result a whole infrastructure was built around the airport providing much needed jobs and income in what was otherwise a depressed region of Ireland.

By the late 1950s however advances in aviation technology meant that planes would no longer need to stop in Shannon for refuelling. This downturn in Shannon's fortunes was the catalyst for the formation of the Shannon Free Airport Development Company (Shannon Development) to help revive the local economy.

Originally its remit covered only the airport zone but since 1979 its role has



expanded and today it is Ireland's only dedicated regional development company with a brief for developing industry, tourism and the rural economy in the Shannon region. The Irish Government set up Shannon Development but its directors and employees say with some relish that it is "the one that got away". Its constitution gave the company autonomy, with directors from the private sector and from inside and outside the region. It soon built itself a reputation for effectiveness and innovation.

Shannon Development targeted the stagnating tourist sector, reasoning that the region's cultural and natural resources had far more potential than had been realised. To kick-start the development process, the Irish Government made Shannon Development the implementing agency for the tourism part of the two programmes of the ERDF from 1989 to 2001, amounting to €39 Million.

The challenge was to use this in partnership with local resources and ideas to achieve sustainable development, marrying economic, cultural, social and environmental aims.

## Product planning and marketing

One reason for giving Shannon Development responsibility for tourism was its expertise in product planning and marketing. The company believes in research as the basis for actions, reflecting business practice. This includes market research, business strategies, business planning and consumer surveys.

Its first task was to develop a tourism strategy. This it did using the experience of the past. Before 1989, tourism growth in the region was negative. Research at national level by *Bord Fáite* and regionally by Shannon Development had identified growth in conferences, activities such as golf and water-sports. But the results were disappoint-

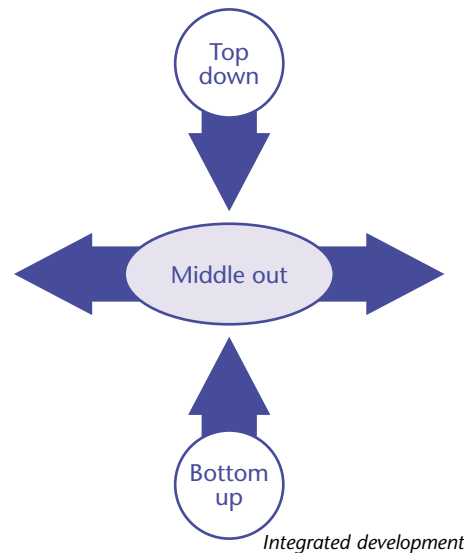
ing despite spending to support developments. One reason appeared to be that the money was being spread too thinly. Another was the way support went to initiatives started by tourism operators.

Shannon Development believed that whilst it was easy to spend money this way it did not succeed in increasing tourism. Its strategy therefore concentrates instead on reinforcing the region's strengths and clusters, through sound spatial planning and market research.

As a result, 19 product themes were identified through market research, focussing specifically on those elements that would distinguish this region from its more celebrated neighbours and so give it a competitive edge. These "hot spots" became the focal point for tourism development but what exactly was developed within these areas depended largely on the ingenuity and originality of local entrepreneurs.

## The middle-out approach

This was possible through a "middle-out" approach to sustainable development - a mixture of "top-down" and "bottom-up". From the top, Shannon Development comes in with big resources and big ideas based on research. National government departments deal with national cultural and environmental issues. And the "bottom-



up" element is brought in either through consultation with locals as a response to top-down proposals or through the stimulation of individual and local authority based proposals, raised locally. The idea is to produce agreement on major projects, respond to the areas of greatest need, reinforce success and co-ordinate development in clusters.

This was made possible through the establishment of a number of local offices in each county to provide micro-business support and promote local development. The offices were thus able to stimulate local initiatives and to offer advice and support for new ideas.

In the initial stages if the venture seemed a viable one, the local office could award its initiator a small grant to help it carry out a more detailed feasibility study and business plan. If the result confirmed the solidity of the project, Shannon Development could then also consider allocating larger investments to get it started. But at the end of the day the initiative would always have to involve an element of private investment and be able to be self-financing once established.

This approach not only built up a strong sense of ownership and responsibility for tourism at the very local level through the provision of much needed

### Shannon vital statistics

<b>Area:</b>	10.000 km <sup>2</sup>
<b>Population:</b>	400.000
<b>N° tourists:</b>	1.988.000
<b>N° bedplaces:</b>	7.800
<b>Average length of stay:</b>	4.8 days
<b>Seasons:</b>	year round
<b>Tourism revenue:</b>	4 million €
<b>Visitor profile:</b>	single or couples
<b>Nationality:</b>	42% Irish people

business skills and support but also encouraged innovative ideas that reflected and infused the individual character of the areas. Consequently, these local initiatives acted like pieces in the jigsaw of the overall regional tourism plan making it easier for Shannon Development to market the region as a whole through trade fairs, newspaper promotions etc and keep a tab on performance. The latter was particularly important since any strategic approach needs to remain dynamic and responsive to changing trends and capable of fine tuning and adjustments.

The following gives three examples of how this middle out approach worked in practice.

### Natural resources: the *Irrus* Project

The Shannon estuary, which is protected as a site of European importance under Natura 2000, holds an important resident population of dolphins. In the early 1990s a local community organisation had the idea to develop and promote environmentally sensitive dolphin watching trips in the bay.

They went to the local office of Shannon Development with their idea. The latter responded by commissioning a study, which highlighted the tourism potential but also the high sensitivity of the environmental issues involved. Local conservationists won backing to establish the Shannon Dolphin and Wildlife Foundation (SDWF). This group prepared a code of conduct for dolphin watching enterprises and calculated a maximum carrying capacity for the Shannon bay in terms of visitor numbers. It also made a series of recommendations on how to offer visitors a quality product with a strong environmental education component.

This led to the establishment of the *Irrus* project whose task it was to steer the development in an environmentally sustainable way. The group is made up of a

wide range of partners from the 'top down' to the 'bottom up' who have successfully helped each other in developing a sound attraction.

The top down group were able to provide access to important initial investment funds through, for instance, the EU's PESCA programme which helped local businesses overhaul their fishing vessels and make them suitable for whale watching.

The SWDF provided conservation advice and support on how to run the operations. It also helped to initiate an accreditation system for those who completed a training programme on dolphin watching and agreed to abide by the code of conduct. Finally, the Marine Institute, the University of the West of England and Shannon Development provided marketing and training expertise.

Only accredited operators who abide by the code of conduct benefit from the concerted marketing campaign run by the *Irrus* group – the other local operators have to find their own ways of advertising and inevitably reach a much smaller audience. Also they cannot fly the *Saoirse na Sionna* flag which identifies those who follow the code of conduct. The flag itself has become a very effective brand since it is recognised as a symbol for environmentally friendly and quality orientated tours.

By 2001, local companies were running dolphin-watching trips from Kilrush and Carrigaholt with commercial success.



Around 15,000 people go dolphin watching now every year. It is the fastest growing component of tourism in west Clare and an important contribution to the local economy. Complementary activities, such as thalassotherapy, wildlife and bird watching add to the tourism offer.

## Local Initiatives: The Kerry Literary Centre

The inspiration for the Kerry literary centre came from the Listowel literary week, which began in the 1970s, and the presence of famous writers in North Kerry. The centre's exhibition features these authors. It also has a shop and a café/ restaurant that doubles as a performance centre for music evenings, amongst others.

A group of individuals formed a small company in 1995 and then acquired a derelict listed building of architectural significance in the centre of town. The fundraising for the development of the Literary Centre building, initial market research and business planning illustrates the Shannon model.

As well as fundraising locally, the promoters secured money from Shannon Development (€7,000) for research as well as subsequent grants for building renovation and installations from central government (€ 2 Million). The local authority meanwhile contributed in kind through the building ownership. The Centre opened in Spring 2001 with 2 permanent employees and 5 on a training scheme for the long term unemployed. The task now is to run the Centre as a significant cultural attraction in the region. On completion of the building works, the centre intends to be self financing.

The fact that the place can double up as a venue for local musical events and concerts will help further to put Listowel on the tourist map. But on its own the centre is unlikely to have been

viable as a tourist attraction. It is the fact that it is another strategic element in the whole tourism offer focussing on growth poles that is the key to its success. Once the focal points are selected there must also be a diversity of products aimed at encouraging tourists to stay longer in the area and to return.

The project also typifies the way local cultural initiatives are encouraged and supported not just for tourism but also for the areas own social matrix. Listowel is a small town with a population of 3,500. The town has an Arts Centre, a cinema and has benefited from an environmental improvement scheme to enhance the appearance of the town and install sculptures in public places. Now it also has a Literary Centre. Tourism is sustaining an enviable cultural infrastructure and underpinning the local economy based on local initiatives.

## Strategic projects: Shannon Heritage

Despite the successes of the local initiatives, Shannon Development's analysis identified a gap between the activities of major operators in the private sector and the initiatives of small business and community groups. While Shannon Development supports and encourages these, it also felt there was a need to launch and run flagship projects itself. These have a demonstration effect on the tourist industry, fostering a culture of enterprise in tourism, creating



growth poles attracting tourists that provide a market for development of other attractions nearby by others. A major attraction can lead to the growth of a cluster.

This is typified by the first site run by Shannon Heritage – a commercially run subsidiary of Shannon Development - Bunratty Castle and Folk Park. It is in a small village, crucially located near

Shannon Airport, the main entry point of tourists from overseas to the west of Ireland. The site has an historic castle hosting a mediaeval banquet and a series of reconstructed buildings, one of which hosts *Style*, a themed Irish dance and dinner event. It now attracts 370,000 visitors a year, employs 50 permanent and 270 seasonal staff itself and led to retail and hotel development nearby on a large scale.

## Case Study 4

# EICHSFELD Germany



*A region, once divided by the border between east and west Germany, reunites to promote tourism based its traditional values and sense of 'heimat'.*

## The area

Until 1989, the very centre of Germany, where Eichsfeld is located, was almost a no man's land from a tourist's perspective, having been split in two by the border between East and West. But it didn't always used to be that way. Covering just 1200 km<sup>2</sup>, with a population of 173,000 the region of Eichsfeld has a strong identity of its own which transcends political boundaries.

This is partly due to it being a Catholic enclave within a predominantly Lutheran part of Germany. Also, a strong sense of family has kept communities together despite the effects of political divides and heavy out migration in search of jobs. As a result Eichsfeld has kept its own very distinct geographical identity, closely linked to its landscape and somehow emotionally far removed

from the latest set of boundaries that criss cross the land today.

Here the German concept of 'Heimat' or home really comes into its own. Small towns and villages feature attractive vernacular architecture with some historic, mainly religious, buildings. The scenery is essentially made up of fields, forests and meadows in an undulating countryside. This is a cultural landscape that has been formed by centuries

of extensive farming practices, as a result it remains very rural and unspoilt. Because much of Eichsfeld was a border region for so long, it is almost as if time has stood still. Farming continued much as it always did, having escaped the general trends of intensification and

industrialisation which swept through most other parts of Germany.

But this did not put the region in good stead economically. After the re-unification of Germany in 1989, the main local industries disintegrated as the potash mines and a textile factory employing 4,000 closed. The agricultural production association collapsed. Unemployment rose to 26%.

This stimulated a consortium of 16 local authorities to develop a coordinated tourism strategy for the region. Its intention was to develop tourism based on the concept of 'Heimat' and in so doing offer some economic alternatives to an area in otherwise serious decline. This is no easy task considering the different East/west approaches and very limited financial resources. But the initial successes so far are a good illustration of how tourism can be developed through regional cooperation without significant financial input.

Tourism in Eichsfeld is essentially regional. 94% of tourists are German and a significant proportion come from the densely-populated Rhineland to the north-west, where many Eichsfelders had migrated to in previous generations. Thus, most tourists are attracted by the region's own distinct local identity rather than to any specific high profile attractions or buildings. With over 240 castles in Thuringia alone, Eichsfeld would not have been able to compete with its more well known neighbours in this respect.

Eichsfeld vital statistics	
Area:	1,200 km <sup>2</sup>
Population:	170,00
N° tourists:	100.000
N° bedplaces:	3800
Average length of stay:	3.4 days
Seasons:	May to October
Tourism revenue:	No figures
Visitor profile:	Pensioners/ groups
Nationality:	94% German

So, instead the consortium of local authorities and local entrepreneurs decided on developing links between villages and activities and promoting these through a dedicated organisation called HVE Eichsfeld Touristik which was set up in 1991. Their motivation reflects a belief in communities working together and a rejection of the artificial divides of "East/West" despite the practical constraints of working across administrative boundaries.

The following provides an illustration of some of initiatives launched to date.

## Religious tourism

As a catholic enclave, Eichsfeld has traditions of pilgrimage and many religious buildings and shrines. Religious history proved to be a tourist attraction for the area and some community groups, including the Catholic Church, began to market religious tourism after 1989. The concept of religious tourism generally, needs great sensitivity and the promoters have moved slowly and carefully.

Many villages and towns have processions on saints days and festivals. These are colourful events animated with religious services and local customs. Christmastime is particularly lively and hymn singing very common. There are also historic pilgrimages, such as the *Corpus Christi* event at Klüschen Hagis, which attracts 20,000 pilgrims (men only but there are also women only events).

Küllsted started a passion play in Easter in 2000, attracting 3,500 visitors, which the local priest is planning to repeat in 2002 and trying to market as an "Oberammergau of the East". At Christmas 2000, over 8,000 people came to take part in the celebrations in this village.

The leaders of this religious tourism initiative, priests and municipalities, promote religious values as well as events and buildings. This is not the same type of tourism as visits to important religious buildings, where the attractions





are the buildings. In Eichsfeld, the traditions and the atmosphere created by the religious events are the attractions. Priests encourage visitors to take part actively in the ceremonies, without missionary fervour but with encouragement towards understanding the significance of the events. This links religious objectives with the aim of promoting social contact between people and the economic benefits of tourism through use of accommodation and services.

Not all of the towns and villages promote religious tourism in Eichsfeld although practically every settlement has a church with a priest. However, participation is growing as the examples of good practice are increasingly recognised. This adds an element of spiritual sustainability to the development process.

## Marketing local products

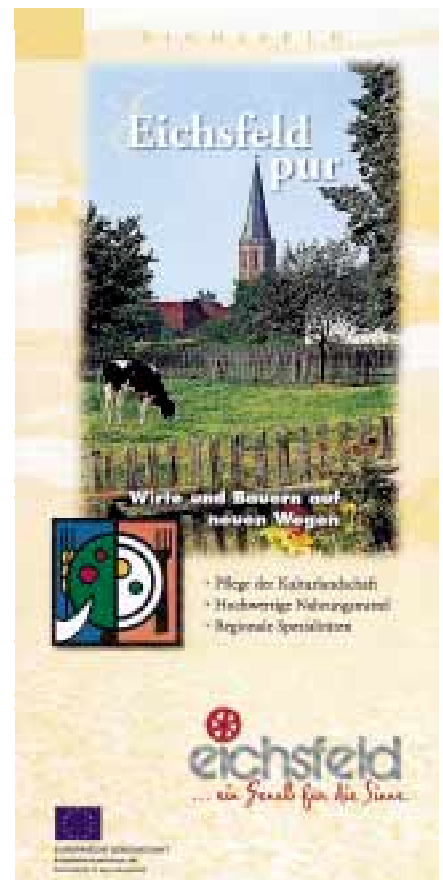
Another typical feature associated with Eichsfeld is its local produce derived from the land. With it comes an expectation of healthy local food products, which are becoming increasingly popular across Europe. Not only can these products be used to enhance the local tourism offer but they can become an attraction in their own right.

Recognising this, local businesses launched a number of initiatives to try to promote local products through tourism. For many local farmers this offered the hope of a new outlet for their produce. Traditional avenues were fast disappearing as they found they could not compete with the larger farming businesses elsewhere.

The first such initiative was called 'Eichsfeld pur' and is a cooperation between farmers and restaurants to promote local products with local recipes. At the outset 10 hotels and restaurants participated in the scheme as did 20 local producers. The scheme showed a lot of success in the early stages but these unfortunately have not been maintained, it seems because not enough was done to capitalise on the initial successes and to use this to promote the scheme more effectively. This emphasises the point that it is not enough to have a good tourism product, it must also be properly organised and marketed to be durable.

Recognising this, 25 local food producers formed the *Erzeugerbörse*, in 1998, an association for the direct marketing of local farm products to the consumer. This is far more active in its promotion and involves a combination of direct sales from the farm, regular farmers markets and a budding mail order business.

The annual farmers market in Kammerode



alone attracts around 15,000 in September. As with the religious festivals the timing of the event is equally important as it provides an interest in the area outside the classic peak seasons and encourages return visits.

## The Environment knows no Boundaries

Another distinctive feature of Eichsfeld has been its strategic location along the border between East and West. This not only has historical and political significance but also an ecological importance. Because these areas were for a large part out of bounds for many decades their natural values remained intact and today they represent an important haven for wildlife and natural habitat features which have largely disappeared elsewhere.

Marrying the concepts of a region without frontiers, epitomised by the strong regional cooperation between authorities across the old divides to promote tourism and the high natural values of the area, with the legacy of the past has led to innovative ideas for tourism.

One such initiative has combined all three features in one location to provide a border museum, a nature interpretation centre and a nature trail along the old frontier near Duderstadt. The combined effects of all three attractions have managed to put this area on the Eichsfeld tourism map.

It all began with Heinz Sielmann, who is a famous German naturalist, with many publications and TV series to his name. In 1988 he made a film on the special wildlife of the area in Niedersachsen around the internal German border. Attracted by the unspoilt nature of the Eichsfeld, he took up the offer of Duderstadt to develop a centre for nature at Gut Herbigshagen.

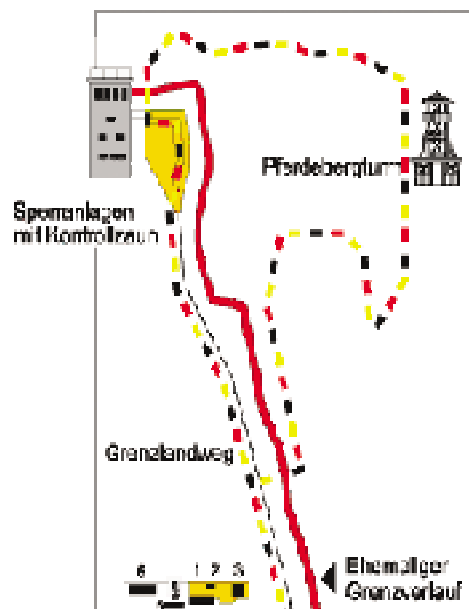
The Sielmann Foundation opened its Interpretive Nature Centre in 1996. It

aims to preserve endangered flora, fauna and their habitats, run an educational programme and contribute to tourism through stimulating interest in nature and ecological issues. The Gut Herbigshagen centre itself has a library, study and seminar facilities as well as accommodation and farm land which is leased out to produce organic farm products.

It holds around 60 seminars a year and runs a weekly educational programme on farming, nature etc... with school groups. As a result schools in the surrounding area use the centre extensively and the overall market for educational tourism focuses on a 100 Km radius, although already, its reputation is such that it is attracting groups from further afield.

Apart from being a commercially viable enterprise in its own right it also provides a source of tourists for the nearby Duderstadt town and participates in the annual 'apples and pears' days there.

The tourism interest is further enhanced by the location of a border museum nearby and an 8 km nature trail which runs along the old frontier to an ex military watchtower. Both are initiatives of the local authorities. The border muse-





um is intended to interpret the themes and issues of the partitioning of Europe at the crossing whilst the nature trail, with its interpretative nature path, acts as a natural and historical bridge linking the unique ecology of the trail with the living cultural tradition of the Eichsfeld.

Many of those employed are placed there through a long term government funded scheme for unemployed. In exchange for the government paying a significant part of their salaries, the centres can offer the trainees regular employment and skills training. As a result both stand to gain.

## Culture landscape route

Finally, the local authorities and businesses are now looking towards networking the different attractions and villages through a cultural landscape route. Amongst the ideas being developed is a marked route for cyclists and/or hikers and a central reservations systems for local accommodation in the different villages. Also, today, nearly every village has or is planning a similar *heimat* museum. They are not big attractions individually but together they contribute to the atmosphere and attractiveness of the Eichsfeld, reinforcing the sense of identity and history of the area.

Although the border museum still needs a strong pedagogical contribution to accurately explain the issues and implications of partitioning in Germany and their relevance in the twenty-first century, the whole project is an imaginative example of how different aspects of tourism, history and the environment, can educate, entertain and produce economic benefits.

It is also an example of co-operation between community organisations, a charitable foundation and local authorities overcoming former ideological divisions and artificial boundaries. This is further enhanced by the way in which the centres are staffed. The nature centre and the border museum have a combined staff of about 40 people.

From a tourism demand perspective all these initiatives have a real potential for success, but they will have to be accompanied by a re-enforced effort on the part of all those concerned so that they can move effectively onto the next stage of tourism development. This means taking stock of the successes and failures of the past in order to revitalise those that are viable and so build a stronger product for the future.





sheep and pigs during the winter months. The age old tradition of transhumance has resulted in livestock being herded twice a year over long distances from their summer pastures high up in the mountains of northern Spain to their winter feeding grounds in Extremadura hundreds of kms away. Such age old practices have created ideal conditions for a wide range of plants and animals to the extent that this is now considered to be one of the 'hot spots' for naturalists in Europe.

But it is not just the landscape and natural beauty that sets Extremadura apart from the others. It also has a particularly impressive history. Its location on the border with Portugal and along the main access way to the Atlantic Ocean has meant that it has attracted successive settlements of the major military and political forces over the centuries. Each in turn has left its legacy of buildings and architecture, which characterises many of the larger towns today.

Merida, for instance, is well endowed with Roman remains including an amphitheatre. Caceres and Trujillo on the other hand are beautifully preserved medieval towns, their rich architecture testifies to the wealth and importance of these areas in the past, particularly during the discovery of the Americas. Trujillo was after all the home town of the famous conquistador, Fransisco Pizarro. Such wealth has been recognised through the classification of no less than three towns - Caceres, Merida and Guadalupe - as World Heritage Sites.

Extremadura vital statistics	
Area:	41,600 km <sup>2</sup>
Population:	1.000.000
N° tourists:	2 million
N° bedplaces:	16.000
Average length of stay:	2-3 days
Seasons:	year round
Tourism revenue:	4 million €
Visitor profile:	Couples & families
Nationality:	90% Spanish

## Drawing up a Tourism strategy

So clearly Extremadura has a tremendous wealth of both natural and man made features to attract tourism to the area. But until recently there was no coordinated approach to guide this development. The main towns were able to attract tourists through their reputation and by the fact that they had a Parador which is internationally recognised but they were then merely used for those who were passing through the area on the way to or from Portugal. Few people stayed more than one night in the region or ventured outside the main towns to explore the rest of Extremadura.

Recognising the tremendous potential for tourism but also the need for a strategic approach to development over such a large area, the Junta de Extremadura decided in 1997 to launch an in-depth study into the region's main assets and constraints. This involved extensive interviews with all interested parties to gauge their views and capacity to engage in tourism activities. It also involved carrying out dedicated market surveys to determine the changing trends in tourism on a national scale and to assess where Extremadura's competitive advantage could lie. The results were then used to develop a SWOT analysis and to draw up a series of recommendations on how to move forward.

Encouraged by the results of the study, the Junta's tourism department drafted a regional tourism plan setting out a coordinated strategy for tourism development over the period of 2000- 2006. This was again widely consulted on, not only amongst the tourism professionals but also, equally importantly, amongst the other sectors of the government to ensure that the final objectives were not only strongly embedded into other policy areas but also into the overall vision for the region's economic development.

The tourism strategy provided an ideal vehicle for ensuring that this integration

could be achieved in practice. This was further strengthened by the fact that the tourism strategy was adopted officially by the Regional government giving it legal weight and a strong political backing.

Thanks to this approach, the strategy was also successfully used as a bidding document to draw down significant financial resources from the EUs Regional development and Intereg Funds. In the case of the former, the strategy offered additional economic justifications for improving the local infrastructure of certain rural areas identified as priority for tourism.

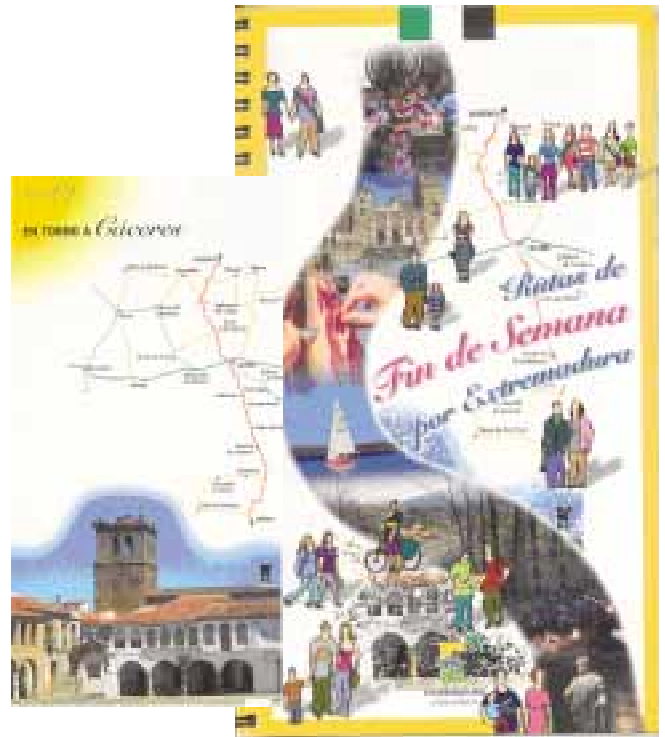
This included for instance the improvement of access roads to these areas, proper signposting as well as improvements within the villages themselves (eg in terms of water and electricity supplies, waste water treatment, or general town planning such as better street lighting, enhancement of central squares etc ... ).

Thanks to this approach rural development and tourism development could proceed in tandem and to the mutual benefit of each rather than as separate parallel initiatives as is more often the case.

## Creating a 'fin de semana' destination

The choice of priority areas for tourism came largely from the results of the tourism study. This noted that thanks to the construction of the motorway between Madrid and Lisbon which passes right through Extremadura, the region was 'transformed' almost overnight from an inaccessible remote region to one that could be reached within a couple of hours from Madrid. Tourism shot up significantly within months of the motorway being built.

The vast majority of these new tourists chose Extremadura as a week-end destination and all indications were that this



would continue to be the mainstay for tourism in the region. Thus, the tourism strategy needed to focus on developing a product that would meet the expectations of these clients and encourage regular return visits over other weekends throughout the year and throughout the region rather than just to the three main towns.

Yet because the region is so large and the range of potential attractions for tourism so wide, there was a very real risk that the tourism offer might be dissipated or under explored. The Junta therefore put a lot of effort in the initial stages of the development process in raising awareness not only of the possible things to see and do in the area but also on how to access them.

This took the form of a series of attractive and easy to use guidebooks with recommended itineraries to follow according to individual preferences and interests.

For instance:

- Itineraries to follow for week-end trips
- Historical/cultural routes ranging

- from the route of the Mudejar to that of the Emperors
- gastronomic routes taking in the different flavours and local specialities of the region
- discovery circuits across the frontier area between Spain and Portugal in the area previously known as Lusitania
- stop overs along the Ruta via de la Plata (this follows the main access road currently being built to link the North of Spain to the South through Extremadura)

Thanks to these, it was much easier for the tourists to plan their trip to Extremadura and to choose an area that particularly suited them. If satisfied with their experience of one route they would then be encouraged to try out other recommended trips or circuits elsewhere in the region. Recent tourism surveys have indicated that this strategy seems to be paying off handsomely despite the initial high outlay. 47% of visitors to Extremadura in 2000 state that they have visited the region already five or more times previously.

The Junta has now followed this up with a dedicated website of proposed itineraries to reach those who have little time to plan and need information at their fingertips as is often the case for busy Madridians wanting to escape the stress of their hectic lifestyles.

Thanks to this strategy many parts of Extremadura that would otherwise have remained unexposed to tourism were able to benefit as well, not least because their development was at the same time being underpinned by an overall tourism strategy.

## The example of Sierra de Gata

How this worked in practice is well illustrated by the experiences of the villages in the mountainous area known as Sierra de Gata. Located in the far north-

west of Extremadura this area, which is one of the poorest in the region, epitomises the fate suffered by many remote areas of Spain. As it became increasingly hard to eek out a living many farmers and villagers had to abandon their land in search of better employment opportunities elsewhere.

Recognising that the heart was being torn out of these closely knit rural communities, the local women of the villages gathered together to try to find alternative sources of income to supple-



ment their family revenues and create new markets for local products.

Their attentions rapidly turned towards rural tourism. The Sierra de Gata has the advantage of being not only scenically spectacular with many intact white-washed hamlets and extensive vistas but also rich in both natural and cultural heritage.

With the help of the Junta de Extremadura and the EU's Leader programme, the women were able to receive one off grants 'a fondo perdido' to renovate and transform their homes into rural accommodation. They were guided in this by experts who advised them on the quality of the tourism products needed to attract tourists and on how to operate as a network. In time a central reservation system was created for the whole area and dedicated tourism documentation produced.

Now the area has one of the highest concentration of rural homes (19 to



date with 166 beds) and the local economies are stabilising thanks to the additional income brought in by the women of the villages. It has also seen the return of a younger generation as the presence of a small but faithful clientele creates new employment opportunities locally.



Here too visitors return time and again in search of tranquil week-ends walking in the fresh mountain air and visiting local historical sites. According

to the latest statistical surveys, the vast majority is very satisfied with their stay (90%) and continues to come back to the area. These preliminary results are most encouraging as they reflect how a strategic

approach to tourism development can work well on a local level for destinations that had not the capacity or the resources to develop as a full scale tourism destination on its own.





# Useful contacts

## **Council of Europe (CoE)**

Details on the preparation the European Landscape Diversity Convention

Details of the Cultural routes

<http://www.coe.int/>

## **Convention on biological diversity**

Contains a chapter on biological diversity and tourism

<http://www.biodiv.org/programmes/socio-eco/tourism/default.asp>

## **Eco-tip**

Internet page on environmental awards and ecolabels, projects and models, jobs and literature

<http://www.eco-tip.org/>

## **Eco-tour**

Comprehensive internet page on ecological tourism

<http://www.Eco-Tour.org/>

## **European Commission: DG Enterprise, Tourism Unit**

Provides an overview of tourism activities by DG Enterprise and downloads of tourism related documents mentioned in the bibliography

<http://europa.eu.int/comm/enterprise/services/tourism/policy-areas/>

## **European Commission: DG Environment**

Details of the Natura 2000 network

Details of progress regarding development of eco-label for hotels

<http://europa.eu.int/comm/environment/nature/home.htm>

## **European Environment Agency (EEA):**

Details of the State of Environment report on tourism, landscapes and biodiversity

Access to NATLAN and Corine biotopes databases on natural areas in Europe

Environment Agency's sustainability indicators for tourism

<http://www.eea.eu.int/>

## **European Heritage Network (HEREIN)**

Set up in 1999, its aim is to convert the Council of Europe's paper databank on architectural and archaeological heritage into a system with fast and easy access via the internet. HEREIN also links up with national heritage policies and provides a portal for to a wide range of heritage related activities across the EU.

<http://www.european-heritage.net/>

## **Eurostat**

Information on European tourism statistics

And GISCO data base

<http://www.europa.eu.int/comm/eurostat/>

## **European Travel Commission (ETC):**

Details of the organisation's activities and reports.

<http://www.etc-europe-travel.org>

**International Organization for Standardisation (ISO):**

International standards for quality management and environmental management  
<http://www.iso.ch/iso/en/iso9000-14000/index.html/>

**LEADER**

Details of the EU Leader fund and database of funded tourism projects  
<http://www.rural-europe.aeidl.be/>

**Organisation for Economic Cooperation and Development (OECD):**

Details of the organisation's activities and reports.  
<http://www.oecd.org/>

**Pan Parks**

Network of National Parks across Europe aiming to combine high quality tourism with strong conservation principles  
<http://www.panparks.org/>

**World Conservation Union (IUCN)**

Details about Protected areas in the world  
<http://www.iucn.org/>

**World Tourism Organisation (WTO):**

Details of the organisation's activities and reports.  
<http://www.world-tourism.org/>

**World Travel and Tourism Council (WTTC):**

Details of the organisation's activities and reports.  
<http://www.wttc.org/>

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