

## Project Report

### WPA 3.1.1 Market Analysis

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## **Preface**

This draft report is based on

- Analysis of structures in CH and cultural tourism market through telephone calls with National tourism boards of Italy, Germany, Slovenia and regional Tourism Associations of Saxony-Anhalt, Thuringia, Modena, Carinthia
- data request to partners for tourism statistics: PP3, PP5, PP6, PP8, PP9 and Carinthia Promotion
- Statistics were analysed, if available on national (DE/AT/IT/SI) and regional (S-A/THU/CAR/MOD/ASTI/SI) level
- Statistical indicators are:  
arrivals, overnights, length of stay ( if possible inbound, CC regions, Europe, overseas esp. US/Canada & China)
- Accommodation infrastructure: companies, beds, nights per bed
- Further qualitative information about travel behaviour: choice of accommodation, means of transport, motif, travel organisation etc. by available surveys/polls (e.g. T-MONA, QUALITÄTSMONITOR Deutschland)

The work plan had been displayed at Steering Meeting I in Asti, January 2009.

Furthermore find herewith the proceedings for establishment of an own census among highlight sites, which shall enter in an ongoing monitoring scheme registering monthly visitor numbers, web sites visits and additional information on visitor structure.

Finally the listed data is needed to facilitate and enable parts of the evaluation of the projects outputs and results (see WPA 1.3.1 through 1.3.9).

As CrossCulTour is based on the network of TRANSROMANICA association data is also displayed for the additional regions Carinthia, Burgundy, Serbia and Europa Romanica in many sections to optimize outcomes for all partners.<sup>1</sup>

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<sup>1</sup> Important basis was the thesis of Juliane Koch, General manager of TRANSROMANICA e.V., Magdeburg-Wernigerode 2008.

## 1. CC regions and cultural tourism

### 1.1 Definition of cultural tourism and cultural routes

#### 1.1.1 Cultural tourism

**Cultural tourism** is usually defined from the demand side and generally differentiated into two major market segments:

- the “**pure**” or “**cultural tourist in the sense of the word**”, meaning that culture is the sole and main motivation for travelling. Study tours are a typical subgroup here.
- the broader segment of “**add-on cultural tourists**” (German: “**Auch-Kulturtourist**”).<sup>2</sup>, where culture plays a considerable role concerning cultural activities during the trip and especially when deciding on the destination, but at the same time not being the main motive for travelling.

Both segments cannot always be explicitly differentiated; in many cases they overlap. Defining market potential through the demand side implies that the tourists themselves determine what “culture” is. This concept corresponds with the discovered broadening of the term “culture” in general, having also contributed to the expansion of the cultural tourism market. Thereafter, in the eyes of participating youth, a rock concert is just as much a cultural tourism event as visiting a symphony orchestra or a gallery of modern art. Transitions between classical and popular culture become even more smooth (“Die lange Nacht der Museen”, “Potsdamer Schlössernacht”, open-air performances of AIDA in front of Schwerin Castle, “Erfurter Domtreppenfestival”, etc.). Today’s cultural tourism products distinguish themselves by a combination with other tourism services (cultural overnight or day trip packages). Consumers should be able to access and book them easily.

**Cultural tourists** and **add-on-cultural tourists** derive from two major tourism market segments:

**Cultural overnight tourists** travelling explicitly or inter alia on cultural motives staying overnight; these can be further differentiated in **short trips** (2 to 4 days with 1 to 3 nights) and **long trips** (from 5 days or 4 nights upwards). **Visits to Friends and Relatives** are differentiated by the kind of accommodation, in this case staying at home with friends and relatives, in contrast with overnight stays when paying for accommodation.

**Cultural excursionist** visiting sites during a day trip. A **day trip/visit** means each leaving from home, not comprising an overnight stay or regular trips to school, workplace, for professional reasons or

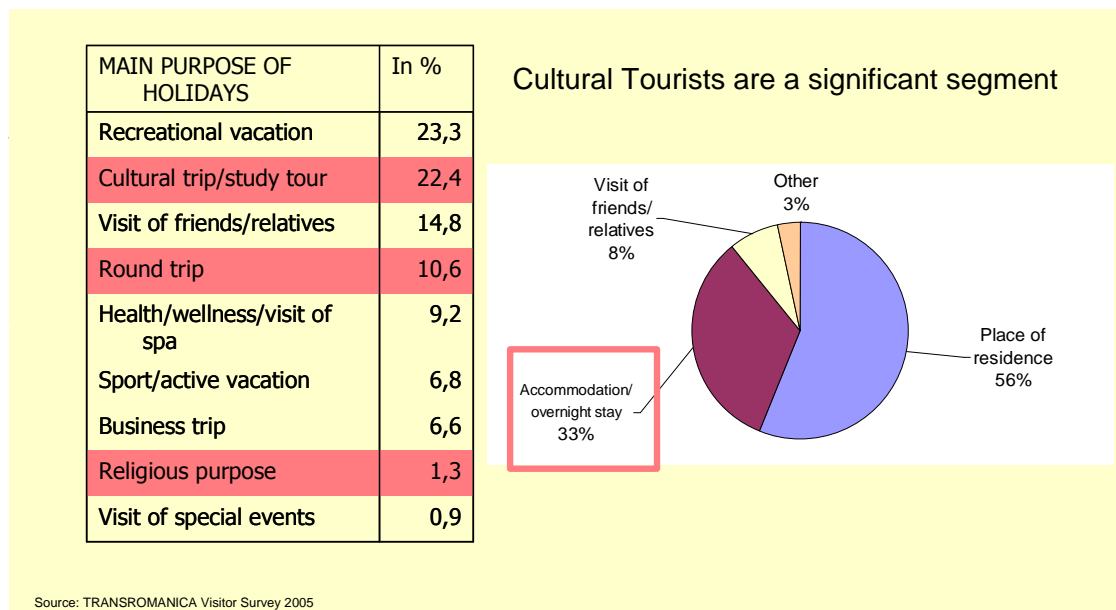
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<sup>2</sup> The differentiation in “**pure**” or “**cultural tourist in the sense of the word**”, meaning that culture is the sole and main motivation for travelling, and “**add-on culture tourists**” (German: “**Auch-Kulturtourist**”) has been assumed from a study by “Reiseanalyse” by LOHMANN (1999, p.64).

shopping for everyday needs or any trips underlying certain routines (dwif 2005, S.13 according to WTO).<sup>3</sup>

### 1.1.2 Cultural tourists and Romanesque Heritage

Visitors to Romanesque sites mainly derive from **day trips**, but overnight tourism and visits of friends and relatives are also a relevant segment suitable for further development. Culture plays not the exclusive, but a major role among holiday makers registered in Romanesque sites.



**Graph 1: Structure and motivation of TRANSROMANICA Visitors**

TRANSROMANICA distinguishes following types of visitors to Romanesque sights related to their relation towards Romanesque heritage and kind of trip (TRANSROMANICA Visitor Survey 2005):

Heavy User	Respondents whose number of previous Romanesque sites visitations is significantly above the average
Specialist	Respondents who announced that the Romanesque sites visitation represented the leading part of their excursion
Multiple User	Respondents who announced that the Romanesque sites visitation represented just one aspect during their excursion
Newcomer	Respondents who had not visited the Romanesque site in the past
Excursionist	Respondents who started the excursion to the Romanesque from the place of their residence (day trips)

<sup>3</sup> **Business day trips** are explicitly excluded. Differences in definitions and census methods cause a limited comparability for findings in day tourism in general, official tourism statistics from CC / TRANSROMANICA partner regions do not contain information on day trips.

### 1.1.3 Cultural routes

#### Tourism and Cultural Routes

- Follow a certain geographically fixed course
- Focus on a defined topic or theme as major attraction and image factor
- Are constituted by a cooperation of public, institutional, cultural and tourism actors
- Are putting on their theme / topic through guided tours, festivals, events and exhibition at sites and location
- Develop tourism offers
- Aim at connecting sites and locations to prolongate length of visitor stays, diversify tourism demand, increase tourism flows and economic effects into peripheral regions

Although touristic or cultural routes often lack sufficient resources in terms of management and marketing and cooperation proves to be quite difficult among the often diversely structured partners and different territorial units they are a popular tourism and marketing tool. Germany disposes of more than 150 tourism routes<sup>4</sup> and dependant on high profile, professionalism of the management and investment in infrastructure, marketing and service routes can acquire a high relevance for regional tourism development. The “Straße der Romanik” as one major marketing pillar of Saxony-Anhalt’s federal marketing accounts for over 1 Million visitors per year in the adjoining sites. St. James Way registers ca. 100.000 Pilgrims every year (<http://www.pilgrimage-to-santiago.com/wp-content/uploads/stat.jpg>). The regional government of Galicia is strategically investing in supplementing tourism infrastructure.

In 2006 TRANSROMANICA has been accepted as **Major European Cultural Route** by the Council of Europe. It is defined as a route touching and crossing multiple regions and countries, displaying a historical, artistic or social theme of European dimension<sup>5</sup>. Requirements are an organisation structure with own budget, a scientific board, extensive public relations and active networking, also with EICR (European Institute for Cultural Routes). Activities derive from work on commemoration, cultural tourism and work with Youth.

Main goal of installation of MCER due to Council of Europe is to raise the awareness for the common cultural heritage, the exchange of people and ideas, the dialogue between the religions, the protection of minorities and landscapes, in order to develop the cultural exchange within the union as a stabilizing source for democracy and achieve the complete integration of the new member states.<sup>6</sup> The statutes of TRANSROMANICA emphasize the obligation towards generally promoting cultural heritage and cultural exchange besides cultural tourism marketing.

<sup>4</sup> DTV (2008), Newsletter VI 2008, Internet: [www.deuschertourismusverband.de](http://www.deuschertourismusverband.de), 20.07.2008.

<sup>5</sup> Ebenda.

<sup>6</sup> EICR (2002), Programm der Kulturstraßen des Europarats, S. 2.

### Main goals of TRANSROMANICA network

to coordinate, promote and develop

- the further growth and improvement of the TRANSROMANICA network,
- sensitive tourist marketing designed to protect monuments,
- public access to Romanesque buildings,
- technical training and further education for members and their staff/volunteers,
- the study and revival of traditional products and the design of good-quality merchandising products descriptive of the Romanesque period,
- identity-building steps taken in the regions involved, and voluntary work,
- cultural events and art projects, which emphasize the specific character of historical buildings while protecting them as monuments,
- publicity for the network and individual buildings, general information and lobbying to cover the Romanesque/medieval periods in all types of publications, conferences, press releases, participation in trade fairs, and the use of the new media, and
- thematic education for children, young persons and adults.

Source: Statutes of TRANSROMANICA e.V.

## 1.2 General tourism structures in CC regions

### 1.2.1 Socio-economic structures

Measured by surface, population and population density the CC/Transromanica partner regions show quite similar structures, none of them belonging to the very densely populated European regions, but being more characterized by rural structures with few large cities and industrialized districts, thus showing mostly preconditions for rural tourism development. Carinthia (about 0,5 Mio inhabitants and 10.000 skm) is the least densely populated region while the Province of Modena (0,6 Mio inhabitants and 2.700 skm) is the smallest partner. Thuringia and the Province of Modena are the most urbanized of the partner regions, having a larger stake in city tourism. All partner regions except Slovenia show a certain loss of population deriving from sinking birth rates and migration problems (especially in East German regions, -10 Percent in Saxony-Anhalt from 1995-2005<sup>7</sup>). The economically strongest partners are Emilia-Romagna, Piedmont and Carinthia, the weaker those members of former Eastern Block (BIP).

<sup>7</sup> Statistical Federal Agency of Germany (2007), S. 35.

	Saxony-Anhalt	Thuringia	Carinthia	Slovenia	Serbia	Emilia Romagna	Burgundy <sup>8</sup>	Piedmont	Europa Romanica <sup>9</sup>
Surface	20.444	16.172	10.327	20.151	77.484	22.117	31.582	25.402	179.381
Inhabitants in m. 2005	2.482	2.344	560	2.019	7.498	4.169	1.623	4.336	10.336
GNP per capita 2007	19 458	19 003	25 362	14 120	4 133	29 670	23 866	26 582	21 820
Largest cities, inhabitants	Halle 240.000 Magdeburg 230.000 Dessau 80.000	Erfurt 200.000 Gera 107.000 Jena 101.000	Klagenfurt 92.000 Villach 58.000	Ljubljana 275.000 Maribor 135.000 Celje 50.000	Belgrade 1.5 billion Novi Sad 233.000	Modena 175.000 Parma 170.000 Ferrara 132.000	Dijon 151.000 Nevers 40.000 Mâcon 36.000 Auxerre 40.000	Turin 905.000 Novara 102.000 Alessandria 91.000 Asti 74.000	Barcelona 1.6 million Sara-gossa 620.000 Santander 184.000 Valladolid 320.000
Airports (within approx. one hour)	Berlin Hannover Halle-Leipzig	Erfurt Halle-Leipzig	Klagenfurt	Ljubljana	<i>not nearby</i>	Bologna Parma	<i>not nearby</i>	Turin	<i>not nearby</i>

**Table 1:**

**Key indicators of partner destinations (KOCH 2008; TRANSROMANICA Swot Analysis 2005)**

In terms of demand for tourism products and sites some project regions will be able to benefit from larger cities nearby: Saxony-Anhalt and Thuringia will benefit from Berlin (3,4 million inhabitants), Hannover (520.000) and Leipzig (500.000), Slovenia might get customers from Trieste (270.000 inhabitants) and perhaps also from Zagreb (700.000 inhabitants) while the province of Modena is located close to the cities of Bologna (400.000 inhabitants), Florence (430.000 inhabitants) and Parma (170.000 inhabitants) and Asti in Piedmont near Turin (905.000 inhabitants). Dijon with its 151.000 inhabitants is the main city of Burgundy while Lyon is the closest larger city. In Serbia, Belgrade and Novi Sad represent the main cities although the Romanesque sites are rather in distance. The area of Europa Romanica covers such a wide surface that the question about the influence of big cities as source for visitors allows no simple answer. While one highlight site might profit others are much too far off from either Barcelona, Madrid or Bilbao. Carinthia finds itself quite isolated from nearby cities, Graz (240.000 inhabitants) being the only one at quite a distance and located on the other side of the Carinthian alpes, although it might benefit from transit traffic between Salzburg and Trieste.

<sup>8</sup> Data from 2006.

<sup>9</sup> Cantabria, Catalonia, Castily-Leon, Aragon.

Saxony-Anhalt and Thuringia dispose of comparably high accessibility as several highways, interstate routes and a dense railway- and commuting network as well as the Airports Leipzig/Halle and Erfurt provide quick arrival also for the peripheral regions and sites and enable excursions to major cities (Berlin and Leipzig) on the other hand. Same accounts for Klagenfurt/ Carinthia and Bologna and Parma/Emilia-Romagna concerning flight connections, while Europa Romanica and Serbian sites face problems in accessibility (airports in more than 200 km distance, lack in railways net).

Accessibility will decide potential for (international) tourism marketing significantly. In fact some TRANSROMANICA highlights are located very favourably where as others are very remote and will face a tough challenge to attract visitors in larger numbers as well in regional as in international terms (see SWOT-Analysis TRANSROMANICA 2005<sup>10</sup>). Especially the sites in Havelberg, Potsreda, Fanano and Frassinoro are located quite unfavourably.

Distance to nearest motorway access	Distance to nearest city (> 100.000 inhabitants or above) in minutes travel time by car				
	<= 20 minutes	21-40 minutes	41-60 minutes	61-75 minutes	> 75 minutes
<10 km	++ Magdeburg Erfurt Arnstadt Maria Wörth Modena Parma Ferrara	+ Merseburg Carpi Koper Sticna	o Eisenach Milstadt	o Kyffhäuser	
10-20 km		o Naumburg	o St. Paul Lasko		
20-30 km	o Nonantola	o Ptuj	- Paulinzella		-- Potsreda
> 30 km		- Friesach	- Halberstadt Quedlinburg Gurk	-- Frassinoro	-- Havelberg Fanano

**Table 2: Location and accessibility of highlight sights (TRANSROMANICA Swot Analysis 2005)**

Geography of partner regions in climate and physical appearance is ranging from the moderate climate of central Europe (Saxony-Anhalt and Thuringia) to the alpine climate of Carinthia and mediterranean climate of the Italian and Spanish partner regions. While Thuringia (Thuringian Forest) and Saxony-Anhalt (Harz mountains) are characterized by typical landscapes of medium mountain range, river landscapes (Elbe and Saale) and flats (Börde in Saxony-Anhalt), Carinthia,

<sup>10</sup> For purpose of analysis accessibility had been defined as the distance of a highlight site to the nearest large city (roughly 100.000 inhabitants or above) and to the nearest motorway. The justification of the latter criteria was the assumption that a location close to a motorway will enable sites to draw visitors from passers by.

Slovenia and the West of Serbia is home to mountain ranges. Slovenia, Emilia-Romagna and Europa Romanica have access to sea, all others having more or less prominent lakes or rivers (Elbe, Saale, Danube, Saone, Po), giving certain potential for summer and leisure/water based tourism. Wine regions form characteristic landscapes in nearly all regions, especially in Asti/Piedmont and Burgundy.

This generally enables different forms of tourism as city tourism and round trips, visits to Spas, biking and hiking in nearly all regions to singularities as winter skiing holidays in Carinthia or beach trips to the coast side of Slovenia and Emilia-Romagna.

From a cultural point of view especially Thuringia with its residential cities (e.g. Weimar, Erfurt), Saxony-Anhalt as medieval “heartland” of Ottonian times and the urbanized parts of the Province of Modena as well as Asti as part of greater region Piedmont and the major city Turin show a certain concentration of historical sights, which differs from Carinthia with lowest population density of partner regions and Slovenia, which covers the whole cultural offer as a nation of its own.

### 1.2.2 Tourism in general

Measured by typical tourism indicators **Carinthia** (tourism intensity 2.400) outraces all other partner regions as a traditional summer and winter leisure holiday destination (longest average length of stay) with guests mostly coming from Germany (50%). This corresponds to a relatively high share of income through tourism (6%, here only overnight tourism). All other partner regions show a lower economic dependance or significance of the tourism sector, tourism being there only one economic pillar next to many others.

Of course the role of tourism differs **intra-regional** as well as from community to community. For example the Harz mountains or Thuringian Forest as rural and traditional holiday regions show a much higher tourism intensity and economical dependancy than their federal lands as a whole. **Nevertheless none of the partner regions – sparing Carinthia – can be assessed as typical or thorough tourism destination. Tourism is mostly at the stage of being developed as one interesting sector for stabilizing economic structures in certain sub regions and cities, but not as major focus of the entire region or country.**

The **development of tourism** within the partner regions generally shows an increase in overnight stays for the last five year period of 1998 to 2007 (especially in Slovenia, but also Saxony-Anhalt and Thuringia). Although this positive trend can not be satisfying taking into account the considerable low occupancy rate, which is economically not sufficient. Although it has improved in Saxony-Anhalt, Thuringia and Carinthia (2003: about 26 to 29 percent). That tourism businesses among the partner regions face a difficult market situation (high pressure through international competition, restricted spending/consumption by private and public households) can partly be read from the

decrease in number of beds which indicates ongoing market consolidation processes (Thuringia and Carinthia).<sup>11</sup>

	Saxony-Anhalt	Thuringia	Carinthia	Slovenia	Serbia	Emilia Romagna	Burgundy	Piedmont	Europa Romanica <sup>12</sup>
Overnight stays 2008 in thousand	6.700	9 250	12 960	8 410	7 334	n./a.	4 806	11 560	n./a.
Overnight stays 2007 in thousand	6 521	8 635	12 794	8 261	7 329	54 293	4 766	10 316	57 455
Average length of stay in days 2007	2,5	2,8	4,8	3,1	3,2	6,1	4,0	3,1	2,3
Development of overnight stays 1998 - 2007 in %	+ 22,5	+17,8	-3,1	+31,2	+1,9	+2,1	n./a.	+27,5	n./a.
Average length of stay in days 1998	2,5	3,0	5,9	3,5	n./a.	n./a.	4,9	n./a.	n./a.
Beds 2007	55.542	68.041	205.389	82.515	88.598	930.524	n./a.	181.313	n./a.
Bed nights 2007 (occupancy rate)	32,6	35,8	33,1	25,6	22,7	16,0	n./a.	15,6	n./a.
Beds 2003	54.295	72.973	216.517	80.724	n./a.	n./a.	n./a.	n./a.	n./a.
Tourism intensity <sup>13</sup>	267	375	2 281	409	98	1 302	296	241	556
Share of income through overnight tourism	0,97	1,56	6,0	n./a.	0,4	n./a.	n./a.	n./a.	n./a.

**Table 3: Key indicators of partner destinations (Koch 2008, completed 2009)**

Again SWOT-Analysis has shown that capability of partner regions and local communities to accommodate (foreign) guests within neighbourhood of highlight sites varies distinctively. It seems easiest in Saxony-Anhalt to accommodate tourist at all highlight sites in a decent hotel while this is a

<sup>11</sup> Especially East German regions still have to recover from the fall of the wall (1989) and the deep changes affecting the formerly publicly controlled tourism sector there now facing forces of an open market.

<sup>12</sup> Cantabria, Catalonia, Castily-Leon, Aragon.

<sup>13</sup> Overnight stays per 100 inhabitants.

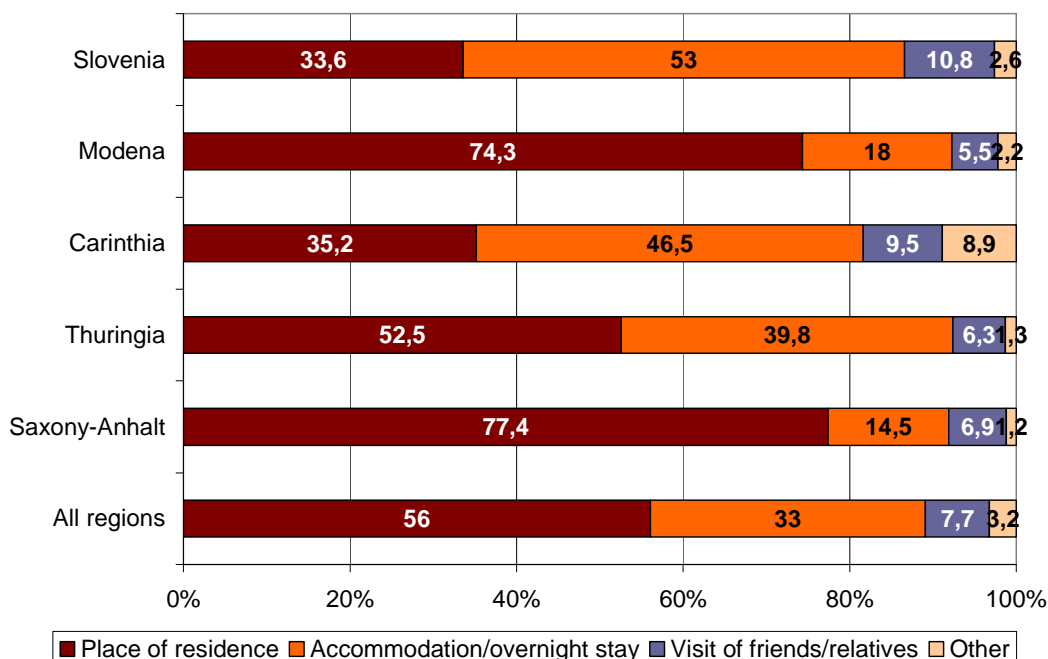
very tough task in most of the Slovenian, the remote Italian and in some interesting Carinthian highlight locations. The following table summaries the availability of hotels in the project locations.

	Saxony-Anhalt	Thuringia	Carinthia	Modena	Slovenia
Very good	Magdeburg Quedlinburg	Erfurt Eisenach	Millstatt	Modena Parma Ferrara	
Good	Halberstadt	Kyffhäuser (fairly)	Maria Wörth		Koper
Limited	Havelberg Naumburg Merseburg	Arnstadt	Friesach (very limited)	Carpi	Lasko (very limited)
Inadequate		Paulinzella	Gurk St. Paul	Fanano Frassinoro Nonantola	Ptuj Ivančna G. P. Potosreda

**Table 4: Hotel offer in highlight locations (TRANSROMANICA Swot Analysis 2005)**

### 1.2.3 The role of day visitors

As has been shown within 1.1.2 the segments of **culturally motivated excursionists** respectively day trips are of major importance as source market for visits to Romanesque heritage sites in all partner regions.



**Graph 2: Structure of Visitors to Romanesque Highlight Sites (TRANSROMANICA Visitor Survey 2005)**

Unfortunately regional statistics apart from Germany (Saxony-Anhalt and Thuringia) provide no official data or statistic for the market of day trips, which is of generally high importance for the tourism industry and shows a considerable share of especially culturally motivated sub segments. Tourism research in Germany indicates that the role of day visitors, not staying overnight, is tremendously important from an economic point of view and often underestimated in the formulation of tourism strategies. Here day trips contribute to national income by 2.44 percent whereas overnight tourism only accounts for 1.16 percent (dwif 2007).

2.970 million day trips registered in Germany in 2006

315 million (10.6%) visiting a special event (e.g. concert, festival, exhibition)

250 million (8.4%) visit of sights/attractions (e.g. leisure park, zoo, church, castle, museum, landscape or nature attractions)

74 million (2.5%) organised trips (e.g. work outing, school, club or bus excursion, etc.)

21.5 percent are connected directly to cultural aspects as main motivation. While all day trips grew by 8 percent between 2004 and 2006, day trips with visits of sights and attractions raised by 28,2 percent. In Saxony-Anhalt there are 12 day visitors per one overnight stay of a tourist. In Thuringia this relation is close to 8.5 : 1, while corresponding data for other project destinations are missing (dwif 2007). However, based on the structure of other destinations we can assume that the (economic) role of day visitors will be rather low in Carinthia and Slovenia and very high in the province of Modena.

### 1.3 Relevance of cultural tourism in CC regions

#### 1.3.1 Cultural tourism marketing focus and strategic aims

Development of cultural tourism is used as an opportunity to diversify tourism structures in order to attract new target groups, to give reason for repeat visits and for distinction from other competitors (image improvement/ sharpening of profile). **For all partner regions culture already was or has become a relevant tourism marketing topic (see table below).** The implication from the tourism market consolidation is that newly entering destinations and enterprises have to present competitive offers which have to meet high consumer expectations and cost conscious clients, and traditional tourism suppliers face the challenge to relaunch their offers and products searching for new incentives and motivations to address the customer.

Developing unique potentials such as the cultural resources (here the Romanesque heritage and further cultural resources) seems to be one way to cope with this situation.

- Cities: Increase client relation (repeat visits), diversification (develop segment complementary to business travel), image shift/improvement
- Traditional holiday destinations: attract new niche (culture tourism/ short trips), image shift or improvement, increase client relation (repeat visits)
- New destinations (smaller cities, rural areas): Form profile/positioning in the market, attract visitors/guests with very concentrated and ambitious development of specific target groups

Further more all partner regions aim at setting in operation at least one of the here listed strategies, also through the promotion of Romanesque heritage and within CrossCulTour.

	Saxony-Anhalt	Thuringia	Carinthia	Slovenia	Serbia	Emilia Romagna	Burgundy <sup>14</sup>	Piedmont	Europa Romanica <sup>15</sup>
<b>Cities:</b> Repeat Visits, diversification & image shift	X	X						X	
<b>Traditional Destinations:</b> new niche, image shift & repeat visits		X	X	X		X			
<b>New destinations:</b> positioning & attract target	X	(X)	(X)		X		X	X	X
<b>Cultural Tourism Marketing focus</b>	Culture & Cities/ Marketing pillars	Culture & Cities (Classic/ Bauhaus)	Build up topic Culture	Themed Routes/ Culinary/ Wine	Culture (Cloisters/ Highlights/ Villages)	Culture/ Arts/ Architecture/ Gastronomy/ Spiritual	Culinary Specialities	Gourmet/ Wine/ Castles/ Museum /Crafts/ Spiritual	Culture/ Gastronomy/ Wine

**Graph 3: Strategic aims in Cultural Tourism and Cultural Tourism Marketing Focus among partner regions (based on TRANSROMANICA SWOT analysis 2005)**

The cultural marketing focus offers multiple starting points for cooperative marketing respectively cross-marketing between and among the listed partner regions.

<sup>14</sup> Data from 2006.

<sup>15</sup> Cantabria, Catalonia, Castily-Leon, Aragon.

### 1.3.2 Cultural tourism as market segment in Partner regions

As the official regular tourism statistics often lack the information on the main travel motive only singular or irregular market research studies provide information about the amount and relevance of cultural tourism demand among the partner regions. Herewith are displayed characteristics and data for cultural tourists in Austria, Carinthia and Germany summarized as fact sheets.

### FACT SHEET Cultural tourists Austria

Source: regular survey "T-MONA"<sup>16</sup>

Main types of holidays spent in Austria during the summer 2008:

- 46% named "recreation"
- 43% "hiking"
- 41% "activity".
- 20% "culture" (only 9% in summer!)
- 15% "culinary journey".

activities during holidays

- 80% consumption of typical food and beverage-products
- 50% regular or casual hiking
- 31% visit museum and expositions

"culture- and sightseeing-tourist" is

- interested in: new aspects, learning, seeing remarkable objects and experiencing urban flair. He highly appreciates the Austrian places of interest, natural attractions, the offer in culture and art as well as the image of the destination
- Additionally also attracted by culinary journeys
- Deriving from several countries of origin, rather well educated
- Characterised by high information needs, often has booked packages and travel in groups
- quality of the accommodation is generally important
- typical activities: the visits of museums, exhibitions, events with classical music, places of interest and shopping, rather no sport
- "hiking tourist" is also interested in culture and culinary

<sup>16</sup> The following aspects have been extracted from the study „T-MONA“ Urlauber in Österreich Sommer 2008“.

### FACT SHEET Cultural tourism in Carinthia

Source: analysed by the Kärnten Werbung in 2007

Differentiation of two groups of cultural tourists in Carinthia:

- The “pure” cultural tourists constitute only a minor market share, but they can easily be motivated for cultural holidays.
- High proportion of guests, who consider culture as an aspect within their “normal” holidays. Rather difficult to motivate these for cultural holidays
- 50% of the participants of the survey indicate that “culture” is important or even very important during the holiday planning.

Carinthia is qualified as a “cultural country” and holds in this respect the third position in Austria following Vienna and Salzburg.

Cultural tourists in Carinthia turn out

- to have higher expenditures per day,
- a higher formal education and are elder than the average tourist

Among the well-known cultural-touristic attractions

- “Wörthersee Festspiele”
- the “Carinthian Summer”
- “Burgarena Finkenstein”.

Three main themes with regards to culture prove to be relevant for tourists

- Castles and Palaces
- Churches and Monasteries
- Folk Culture
- significance of culinary and regional products for cultural tourists.

### FACT SHEET Cultural Tourists in Germany

Source: Qualitätsmonitor Deutschlandtourismus / Europäische Reiseversicherung AG and DZT, 2009 and German National Tourist Office DZT

#### Main types of holidays spent in Germany in 2009; Culture as strong motive

- 55 % Recreational Holiday
- **24 % Cultural Tour**
- **23 % City Trips**
- **21 % Sightseeing Trip**
- 21% Activity Holiday
- 18 % Family Holiday
- 16 % Hiking Holiday
- **15 % Visiting an Event**
- 14 % Holiday for Health Reasons
- 10 % Cycling / MTB Holiday
- **6 % Culinary Tour**
- 5 % Shopping Holiday

**Foreign tourists** even show a **stronger cultural motivation (52%)**, following facts applying to cultural tourists in Germany in general, even more apply for foreign cultural tourists

#### Information sources for cultural holiday makers: Travel guides and Travel agencies above average

- 51 % Internet (ranking from town/city site – search engine – place of stay to region and tour operators site)
- 36 % Travel guide and literature
- 36 % Friends and word of mouth
- 27 % Travel agency at home

**Means of transport and accommodation for foreigners: Flight** clear above average (30 %) and **hotels** (50 to 56 %), especially 4 or 5 star categories, also due to predominant city tourism

**Activities of cultural tourists** characterized over average by cultural orientated such as sightseeing, visits to museums, exhibition and cultural events (festivals, classical music), guided tours and organised excursions

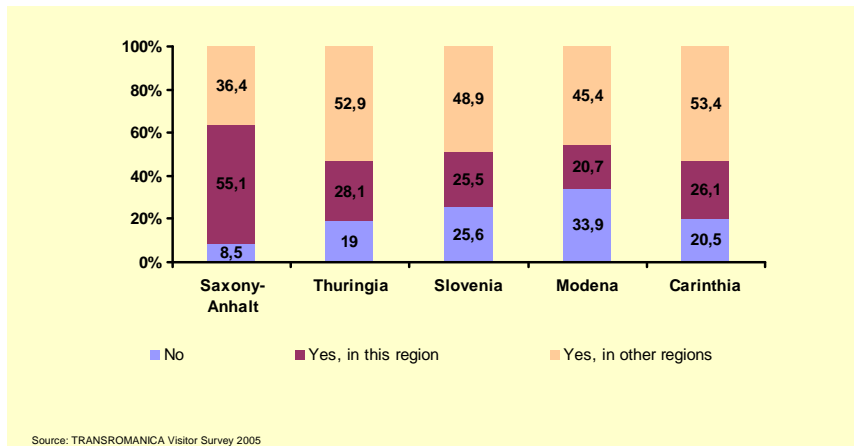
**Additional activities** which complete or supplement cultural trips are shopping, nightlife, visits in cafés and restaurants and enjoying regional dishes, **not:** sports, walking in nature and wellness

**Cultural tourists** show a **high satisfaction** concerning cultural oriented activities (well informed, decisive in their expectations), but **customer loyalty** in terms of repeat visits is lower. They rather long for new attractions and regions which underlines the potential for cross-marketing other destinations among this target groups.

The TRANSROMANICA survey of 2005 underlines certain findings about cultural tourists in general as the major information sources, ranking from internet, literature/travel guides to word of mouth, the curiosity for new places and experiences as driving motivation for travelling and the generally given cross-marketing potential between different regions with Romanesque heritage.

## Visitors´ Cross-marketing potential

Did You visit other Romanesque sites in the past?



11.06.2009, Berlin, Landesvertretung of Saxony-Anhalt



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**Graph 4: Visitors´ cross-marketing potential (TRANSROMANICA Visitor survey 2005)**



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## 2. Main markets for overnight tourism in CC regions and their cultural tourism potential<sup>17</sup>

### 2.1 Main markets for CC-regions and their development<sup>18</sup>

	Saxony-Anhalt	Thuringia	Carinthia	Slovenia	Serbia	Emilia Romagna	Burgundy <sup>19</sup>	Piedmont	Europa Romanica <sup>20</sup>
Overnight stays 2007 in 1.000	6 521	8 635	12 794	8 261	7 329	38 174	4 766	10 316	57 455
Arrivals 2007 in 1.000	2 583	3 133	2.626	2 681	2 307	8 665	3 527	3 352	22 319
Share of arrivals in domestic tourism (inbound) 2007	93 %	92 %	42 %	34 %	33 %	76%	68 %	60 %	n./a.
Share of Arrivals from other European countries 2007	6 %	6 %	53 %	50 %	66 %	21%	30 %	36 %	n./a.
Share of Arrivals from foreign countries 2007 (outside Europe)	1 %	2 %	5 %	16 %	1 %	3%	2 %	4 %	n./a.

**Table 5: Tourism indicators International Tourism<sup>21</sup>**

<sup>17</sup> Sources: Statistisches Landesamt Sachsen-Anhalt, Statistisches Landesamt Thüringen, Thüringen Tourismus, Deutsche Zentrale für Tourismus, Österreich Werbung, [www.tourmis.info](http://www.tourmis.info), Kärnten Werbung, Statistik Austria, Agenzia Nazionale del Turismo – ENIT, Regione Emilia-Romagna – Servizio Turismo e Qualità Aree Turistiche (<http://www.emiliaromagnaturismo.it/new/asstur/stattur.htm>), Sviluppo Piemonte Turismo, Slovenian Tourist Board ([www.slovenia.info](http://www.slovenia.info)), Istituto nazionale di statistica ([www.istat.it](http://www.istat.it)), Statistical Office of the Republic of Slovenia ([www.stat.si](http://www.stat.si)), eurostat (<http://ec.europa.eu/eurostat>)

<sup>18</sup> Final statistical data for 2008 in Emilia Romagna not yet available.

<sup>19</sup> Data from 2006.

<sup>20</sup> Cantabria, Catalonia, Castily-Leon, Aragon.

<sup>21</sup> **Burgundy:** INSEE - Direction du Tourisme - Partenaires régionaux: Arrivées hôtels Bourgogne 1999 – 2007; **Carinthia:** Statistik Austria, Bundesanstalt Statistik Österreich (2008), Internet, <http://www.statistik.at>, 11.09.2008; Internet, <http://www.statistik.at>, 11.09.2008; **Emilia Romagna:** Osservatorio Turistico Regionale (2008); **Piedmont:** Piemonte Turismo (2008), Internet, <http://www.regione.piemonte.it>, 11.09.2008; **Saxony-Anhalt:** Statistische Landesamt Sachsen-Anhalt (2008): Internet, <http://www.statistik.sachsen-anhalt.de>, 11.09.2008; **Serbia:** Statistical Office of the Republic of Serbia (2008), Internet <http://webzrs.statserb.sr.gov.yu>, 11.09.2008; **Slovenia:** Statistical Office of the Republic of Slovenia (2008), Internet, [www.stat.si](http://www.stat.si), 11.09.2008; **Europa Romanica:** Instituto Nacional de Estadística, <http://www.ine.es>, 11.09.2008; **Thuringia:** Thüringer Landesamt für Entwicklung (2008, Internet <http://www.tls.thueringen.de>, 11.09.2008.

The following structures are evident:

**Inbound tourism** flows generally dominate the overnight stays in the CC Project Partner regions , but there are considerable differences concerning relative weight ranging from lowest in Carinthia (27,2%) and highest in Thuringia (94%) and Saxony-Anhalt (93%), followed by Piedmont (58%) and Emilia-Romagna (79,1%).

**Carinthia (72,8%) and Slovenia (59%)** register highest tourist share from abroad: In 2007, more German than Austrian tourists spent their holidays in Carinthia (4.870.248 overnight stays deriving from Germany vs. 4.653.618 from Austria).

Apart from the **low level of incoming from outside Europe** – ranging from Slovenia (16%) to Thuringia and Saxony-Anhalt (1%) - solely **Thuringia** records **USA as extra-European country** among its top 5 (6% of all foreign tourists).

The following table indicates the five main source countries for incoming tourism in the Partner regions.

	Saxony-Anhalt	Thuringia	Carinthia	Slovenia	Emilia Romagna	Piedmont
1.	Netherlands	Netherlands	Germany	Italy	Germany	Germany
2.	Danlmark	Switzerland	Netherlands	Austria	France	Netherlands
3.	Poland	Austria	Italy	Ger-many	Switzerland (incl. Liechtenstein)	United Kingdom
4.	United Kingdom	USA	Hungary	United Kingdom	Russia	France
5.	Austria	Poland	Czech Republic	Croatia	Netherlands	Switzerland

**Table 6: Main countries of tourists' origin – Incoming**

The following table summarizes the overnights to all TRANSROMANICA/ CrossCulTour Partner regions embracing Serbia, Burgundy and the spanish regions of Europa Romanica. All in all TRANSROMANICA / CrossCulTour regions register **nearly 20 Million arrivals per year**.

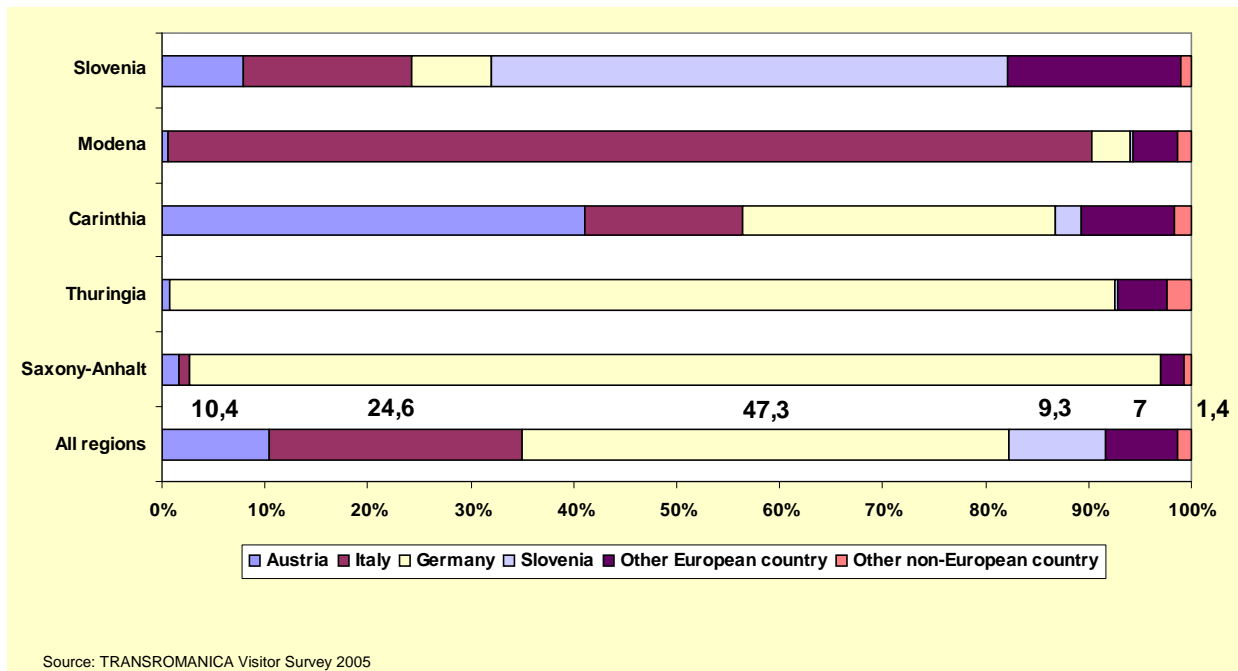
Rank	Europe	Arrivals 2007	Percent (100,0)
1.	Germany	6.618.214	36,1
2.	Italy	2.818.184	15,4
3.	France	2.643.656	14,4
4.	Serbia	1.575.722	8,6
5.	Austria	1.401.104	7,6
6.	Slovenia	1.016.098	5,5
7.	Netherlands	517.309	2,8
8.	United Kingdom	494.749	2,7
9.	Belgium	291.773	1,6
10.	Switzerland	277.020	1,5
Rank	Overseas	Arrivals 2007	Percent (100,0)
1.	USA	218.558	55,3
2.	Japan	63.328	16,0
3.	Australia	39.048	9,9
4.	Canada	37.958	9,6
5.	PR China	36.253	9,2

**Table 7: Main countries of tourists' origin – Inbound and Incoming among all Transromanica/ CrossCulTour regions<sup>22</sup>**

The grey marked lines indicate the **apparent potential for interregional cross-marketing** identifying **Germany** as most important market for all considered CC/TRANSROMANICA partner regions followed by Italy, Serbia, Austria and Slovenia. **France<sup>23</sup>**, **Netherlands and United Kingdom** followed by **Belgium and Switzerland** are further European markets of relevance apart from network regions.

<sup>22</sup> For sources see reference number 22.

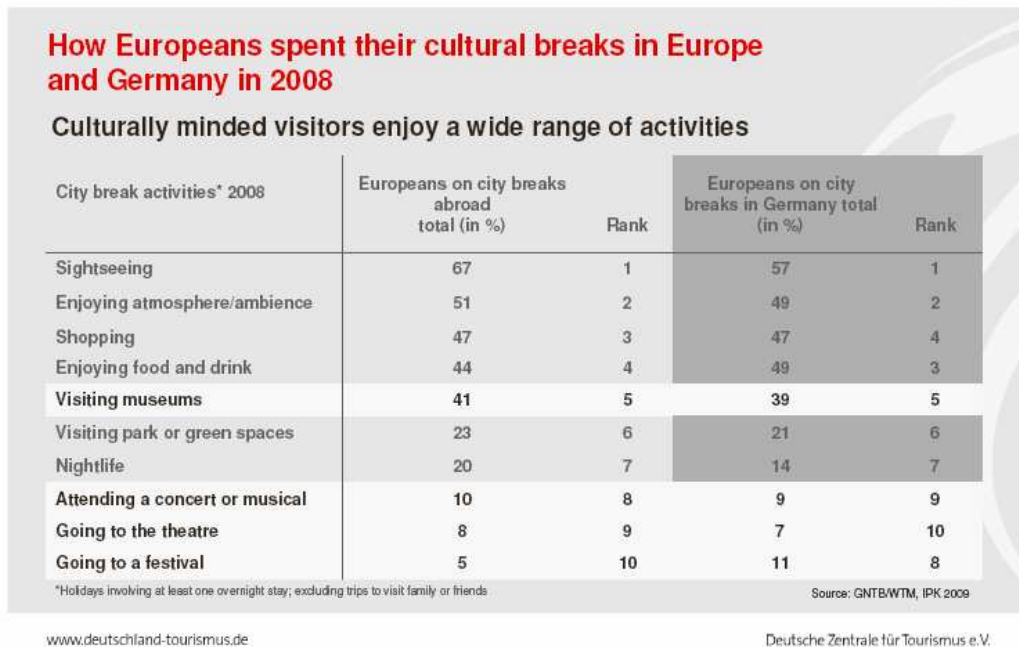
<sup>23</sup> France is not categorized as interregional Cross-marketing region because the very limited market connected to the single member site in Burgundy does not justify this as interregional Cross-marketing relation.



**Graph 4: Visitors to Romanesque sites of TRANSROMANICA by Country of Origin (TRANSROMANIC Visitor survey 2005)**

The visitor structure in Romanesque sites further illustrates the cross-boarder marketing potential between neighbouring regions such as between Slovenia-Carinthia or Modena and Slovenia or Saxony-Anhalt and Thuringia, a starting point for mutually coordinated marketing actions between two partners – as has already been followed by Serbia and Slovenia concerning a common promotional brochure and joint press conferences in source countries (e.g. in Munich/Germany).

The European source market in general proves also very culturally oriented as sightseeing, visiting museums, festivals and events constitute a major part of activities undertaken during city breaks in Europe and Germany (see following graph below).



**Graph 5: How Europeans spent their cultural breaks in Europe and Germany in 2008 (IPK 2009, European Travel Monitor)**

### Perspective

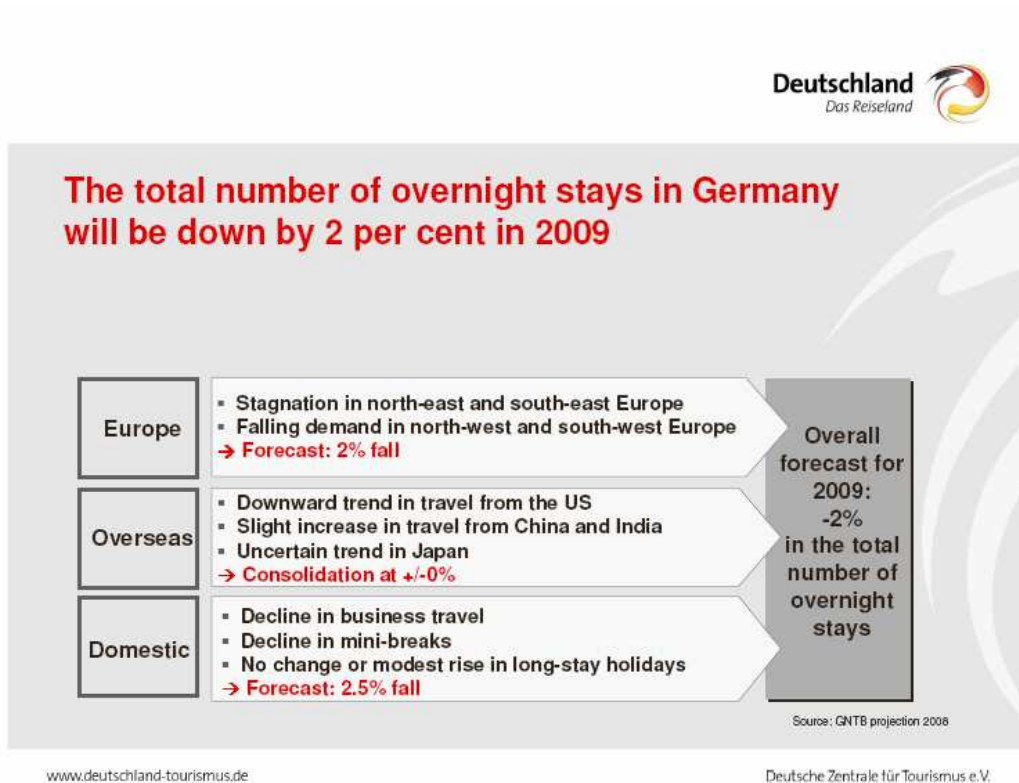
According to the German National Tourist Office and the UNWTO, **Global tourism** is facing a first severe cut down by recent financial crisis (-2 per cent, recent forecast). **Europe as biggest target market for international travel** (registered 54 % of international arrivals worldwide in 2008) already stagnated in 2008, while global tourism grew by 1.7 percent and especially Middle East had shown extraordinary growth rates (+14.4 %).

Concerning **Europe as source market**, Germany is ranked first with a share of 33,3% in 2006 (- 3,2% annual growth rate related to the year 2000), followed by the United Kingdom with 25,4% (+ 6,7%) and France (+ 1,1%) among the EU-27. The fourth position is held by the Netherlands with a market share of 6,2% and an annual growth rate of +1,6% since the year 2000. Italy and Spain are ranked fifth and sixth with a growth rate above average (+ 3,1% resp. + 12,2%), Belgium, Austria, Poland and Denmark following<sup>24</sup>. **Most important European destinations** are Spain (market share of 16,4%

<sup>24</sup> Eurostat / European Commission: Panorama on tourism. Edition 2008

in 2006), Italy (15,9%) and Germany (15,2%) followed by France (12,9%), the United Kingdom (11,5%) and Austria ranked on the sixth position.

The case of Germany shows the impact of recent developments on tourism market substitutional for other partner regions.



#### Graph 6: Forecast for source market development in Germany 2009 (DZT 2009)

The formerly strong growing demand from East Europe is predicted to stagnate, falling demand is foreseen for traditional markets such as US, north-west and south-west Europe. Emerging markets tend to slower their growth rate (India, China). Still National Tourism Boards recommend acting according to the so far evident and long term market structures with the already defined strategies. The recent crisis thus is judged as a passing incident with short term effects which will not change market relations in general and in the long term perspective.

## 2.2 Main markets of origin outside Europe (PATA)

As CrossCulTour finally aims at developing further markets overseas and in Asia, addressed to as Pacific-Asiatic markets as members of PATA<sup>25</sup>, the following table will give an overview on the most important extra-European countries of origin.<sup>26</sup> Data has been analysed in detail by breakdown of each CC partner region.

	Saxony-Anhalt	Thuringia	Carinthia	Slovenia	Emilia Romagna	Piedmont
1.	USA	USA	USA	USA	USA	USA
2.	China (incl. Hongkong)	Japan	China (incl. Hongkong)	Israel	China	Israel
3.	Japan	China (incl. Hongkong)	Arabian Countries in Asia <sup>27</sup>	Japan	Brazil	Brazil
4.	Canada	Canada	Japan	Australia	Japan	Canada
5.	Israel	Australia	Canada	Canada	Australia	Australia

**Table 8: Main countries of tourists' origin – Incoming from outside Europe**

### 2.2.1 Incoming Saxony-Anhalt

Regarding the non-European tourists in Saxony-Anhalt, the United States obviously represent the most important nation with 19.683 overnights in 2007. As Saxony-Anhalt has already published the statistics for 2008, it must be stressed that there has been an increase of 35,6% which results in 26.682 overnights in 2008. Although being the second most important non-European market, China has only generated 8.529 overnights in 2007 which again stresses the relevance of the USA. Compared to these nations, Japan (3.044 overnights), Canada (1.926 overnights) and Israel (1.265 overnights) turn out to be less significant. Considering the 2008 data, China still holds the second position although a decrease of 7,5% can be stated (resulting in 7.892 overnights). Japan remains at the third position and has generated a growth of 15,9% (total of 3.528 overnights) while for Canada an increase of 14% has been established (total of 2.195 overnights). Israel keeps on being at the fifth position with 1.605 overnights (increase of 26,9% compared to 2007). Although the Arabian

<sup>25</sup> Pacific-Asiatic Tourism Association

<sup>26</sup> This overview uses the 2007 data in order to present comparable information for all concerned regions.

<sup>27</sup> Yemen, Bahrein, Iraq, Jordan, Qatar, Lebanon, Oman, Saud Arabia, Syria, United Arab Emirates

Gulf States are not part of the top non-European nations for Saxony-Anhalt, it must not be ignored that their overnights have increased by 128% comparing 2007 and 2008 (from 679 to 1.548 overnights). The following table shows the development of the overnights of relevant extra-European citizens in Saxony-Anhalt within the last five years:

	USA	China (incl. Hongkong)	Japan	Canada	Israel	Arabian Gulf States
2008	26.682	7.892	3.528	2.195	1.605	1.548
2007	19.683	8.529	3.044	1.926	1.265	679
2006	20.539	6.565	3.681	2.134	835	3.704
2005	14.502	6.809	3.208	1.197	961	917
2004	16.407	2.412	3.365	1.353	1.322	453

**Table 9: Development of overnights from non-European countries in Saxony-Anhalt**

### 2.2.2 Incoming Thuringia

When it comes to Thuringia's extra-European markets, the United States clearly demonstrate their leading position: With 26.312 overnights in 2007, the USA has generated more incoming tourists than the countries on the following four positions in total and represent about 40% of the non-European tourists. Nevertheless, Japan holds a share of 10.342 overnights while further countries turn out to be less relevant: China incl. Hongkong (4.477 overnights), Canada (3521 overnights) and Australia (2.559 overnights). Considering the 2008 data, the USA are still ranked first despite a decrease of -11,8% with a total of 23.040 overnights. Equally Japan with a reduction of 11,8% (total of 9.119 overnights) while for Canada an increase of 28,7% with a total of 4.533 overnights can be stated. Due to this development, Canada hold the third position in 2008 with China being placed fourth (decrease of 17,2% with a total of 3.706 overnights). Although not being among the leading five extra-European markets and representing a rather insignificant market share, it should be mentioned that overnights from India turn out to rise above average (increase of +41,4% with 871 nights in 2007 and 58,6% with 1.381 nights in 2008). In addition to this, the Arabian Gulf States must not be ignored neither due to the considerable relative development of their overnights.

The following table illustrates the development for the relevant non-European nations in Thuringia:

	USA	Japan	China (incl. Hongkong)	Canada	Australia	India	Arabian Gulf States
2008	23.040	9.119	3.706	4.533	2.807	1.381	1.105
2007	26.123	10.342	4.477	3.521	2.559	871	817
2006	24.583	8.946	4.668	3.604	2.690	616	1.388
2005	23.760	10.013	3.613	2.622	2.64128	-	762
2004	27.709	12.122	3.867	3.033	2.511	-	798

**Table 10: Development of overnights from non-European countries in Thuringia**

### 2.2.3 Incoming Carinthia

Carinthia's tourists mostly derive from Germany (38,1%) and Austria (36,4%). Compared to these shares, all further nations prove to have rather small significance. Nevertheless, among the non-European nations the United States generate the majority of tourists' overnights (28.410 overnights, i.e. 0,2% of the total). China has produced 13.724 overnights in 2007 (i.e. 0,1%). Arabian Countries in Asia hold a share of 8.530 nights, followed by Japan with 6.062 overnights. Canada (4.472 overnights) and Australia (4.366 overnights) nearly possess an equal relevance. As Carinthia has already published the data for 2008, it can be stated that the overnights from the United States, China and Japan have considerably decreased while the overnights resulting from Arabian countries in Asia have even diminished by 76,8%. Australia and Canada nevertheless have been able to enhance their overnights. The following table shows the development in detail:

<sup>28</sup> The data for 2005 and 2004 indicates the total nights of Australia, New Zealand and Oceania.

	USA	China	Arabian Countries in Asia	Japan	Canada	Australia
2008	23.256	10.432	1.981	4.573	5.643	5.837
2007	28.410	13.724	8.530	6.062	4.472	4.366
2006	24.898	12.518	1.812	7.102	5.190	4.564
2005	27.275	13.755	2.204	6.520	5.425	9.054
2004	28.769	12.093	1.135	6.777	3.849	3.910

**Table 11: Development of overnights from non-European countries in Carinthia**

## 2.2.4 Incoming Slovenia

As to Slovenia, the United States turn out to be the most important country outside Europe with 112.112 in 2007, followed by Israel with 99.295 overnights. In contrast to these figures, Japan (38.905 overnights), Australia (37.119 overnights) and Canada (23.301) are less relevant. Although New Zealand only generated 6.752 overnights in 2007, it should be stressed that the 2006 share (3.008 overnights) has been more than doubled while China does not even appear in the statistics as an individual country. Nevertheless, Chinese tourists represent an important target group for Slovene tourism as it is considered as a fast developing market. This is demonstrated by the establishment of a Chinese office by the Slovenian Tourist Board and a direct flight from Ljubljana to China in 2009. The following table illustrates the development at the top of non-European nations in Slovenia:

	USA	Israel	Japan	Australia	Canada
2007	112.112	99.295	38.905	37.119	23.301
2006	106.992	86.410	29.667	33.067	19.579
2005	89.407	83.947	19.110	28.611	16.691
2004	90.759	88.257	15.951	26.706	19.389
2003	67.729	83.339	12.600	20.116	16.678

**Table 12: Development of overnights from non-European countries in Slovenia**

## 2.2.5 Incoming Emilia-Romagna

The USA also constitute the most important non-European market for Emilia-Romagna with 214.784 overnights in 2007. Compared to this data, even the nation placed on rank two, China proves to be much less significant as its citizens have generated only about one third (36,51%) of the overnights deriving from the United States (78.407 overnights). They are followed by Brazil (50.368 overnights), Japan (50.171 overnights) and Australia (46.581 overnights) followed closely by Canada (46.047 overnights).

	USA	China	Japan	Australia	Brazil
2007	214.784	78.407	50.171	46.581	50.368
2006	208.321	67.914	49.636	41.735	49.873
2005	195.196	61.663	47.740	35.120	45.970
2004	197.716	46.891	57.699	34.239	35.244
2003	188.533	29.388	58.059	28.394	32.457

Table 13: Development of overnights from non-European countries in Emilia-Romagna

## 2.2.6 Incoming Piedmont

Taking into account that in 2007 in Piedmont, 57,9% of the tourists were from Italy and 10,9% from Germany, the significance of extra-European countries turns out to be accordingly low. Nevertheless, the United States hold the seventh rank with a total of 200.813 overnights or 1,95% of all tourists. Compared to the share of Italian, German and even US tourists, the relevance of further non-European incoming tourists is rather negligible: 75.343 overnights from Israel (i.e. 1,26%), 39.227 overnights (i.e. 0,38%) from Brazil, 30.988 overnights (i.e. 0,30%) from Canada and 26.083 overnights (i.e. 0,25%) from Australia. Although not being among the top five, Chinese (24.718 overnights or 0,24%) and Japanese (23.905 overnights or 0,23%) tourists are close to the other nations.

	USA	Israel	Brazil	Canada	Australia
2007	200.813	75.343	39.227	30.988	26.083
2006	431.149	33.715	37.413	161.773	28.263
2005	303.099	41.966	30.006	71.997	32.225
2004	197.899	37.698	20.705	22.638	21.576
2003	192.334	26.518	19.494	19.167	13.859

Table 14: Development of overnights from non-European countries in Emilia-Romagna

## 2.3 Profiles of selected PATA markets and their potential for cultural tourism<sup>29</sup>

### 2.3.1 Northern America / USA

The analysis of incoming non-European tourism has demonstrated the leading position of the United States with their more than 300 million inhabitants. Europe turns out to be a very attractive destination for US-citizens as it is underlined by the Italian National Tourist Board (ENIT) which quotes the results of a survey indicating that 53% of the participants would like to go to Europe while only 19% were interested in travelling to Australia.<sup>30</sup> The most important European destinations in 2007 was the United Kingdom, followed by Italy, France and Germany. For Italy, in contrast, the United States constitute the second most important foreign market (following Germany). As the ENIT points out, US-tourists in Europe are part of an open-minded segment of society with high incomes. While big and well-known cities such as Rome, Florence or Venice still hold the majority of the market shares, it can be stated that the interest for smaller towns and villages is increasing, containing the demand for friendly inhabitants, traditional culinary delights and typical products at reasonable prices. Furthermore, the demand for “educational trips” from students and teachers has increased. Being attracted by the Italian art and culture, many young Americans choose Italy as their preferred destination.

<sup>29</sup> The following information is mainly based on data provided by the National Tourist Boards of participating countries (Germany: Deutsche Zentrale für Tourismus - [www.dzt.de](http://www.dzt.de); Austria: Österreich Werbung - [www.austria.info](http://www.austria.info); Italy: Agenzia Nazionale Del Turismo - [www.enit.it](http://www.enit.it); Slovenia: Slovenska turistična organizacija – [www.slovenia.info](http://www.slovenia.info)) as well as the Market Insights by the European Travel Commission ([www.etc-corporate.org](http://www.etc-corporate.org))

<sup>30</sup> „National Travel MONITOR, Where People Want To Go in 2008“, quoted as per ENIT – Agenzia Nazionale Del Turismo, Paesi e Mercati ([www.enit.it](http://www.enit.it))

Among others religious, rural and active tourism as well as enogastonomy are part of the increasing sectors of interest of US-tourists in Italy. A survey has revealed the following most relevant interests to undertake a journey to Italy: history (32%), art (26%), food (14%) as well as culture (13%) and wine (8%). Most of them visit two to three cities (40%) or more (30% visit three to four cities while 20% even visit five cities and more). When it comes to the activities during the stay in Italy, among others the visits of museum and churches are named as well as wine tasting and concerts/opera (indoor activities) respectively visiting points of interest, shopping, walks, participation at festivals and biking (outdoor activities).

When it comes to US-tourists in Germany, they prefer the federal countries of Bavaria, Hesse, Baden-Wurttemberg and Berlin. The German National Tourist Board equally points out the high incomes as well as the average age of 47.

## crosscultour TRANSROMANICA Focus on USA

- 303,8 Mio. inhabitants with 31,1 Mio. journeys overseas (12,3 Mio. to Europe)
- Dominance in all PP-regions
- Europe as an attractive destination
- Themes: history, art, culture, culinary delight/wine, health, religion, rural tourism, active tourism
- Increasing interest in smaller cities, traditional culinary delights and regional products
- Growing demand for Educational Trips

11.06.2009, Berlin, Landesvertretung of Saxony-Anhalt



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Regarding the situation in Austria, most US-tourists stay in Vienna, Salzburg and Tyrol while Carinthia holds the second last position among the federal states of the country. About 70% of them choose one of the top five places in Austria (among them none in Carinthia). More than 60% of the visitors choose 5- or 4-star hotels. Based on their analysis and market research, the Austrian Tourist Board puts the accent on the strategic themes of “culture”, “culinary delight” (with a focus on wine) and “nature”.

The Slovene Tourist Board notes that among others nature, health, culture, religion and sport are part of the US-tourists’ motives.



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In the context of CrossCulTour, it shall be pointed out that as to the ETC, favourite activities of US-tourists include visiting places of historical and cultural interest. Furthermore, the popularity of tours around a cultural theme is increasing.

### 2.3.2 Canada

Canada with its 32.000.000 inhabitants does not have a position as strong as the United States, but nevertheless appeared among the top non-European markets. Being from the middle or high social-economic level, Canadian tourists in Europe are mainly searching for quality tourism offers. The choice of the destination also depends on the cultural level of the tourists.

Canadians between 40 and 50 years prove to be highly interested in travelling to Europe and this market is expected to increase within the next 10 years. Furthermore, the age group over 50 and those between 20 and 30 are expected to constitute a growing market as well as the academically motivated tourism.

Concerning Canadian incoming tourism to Italy, the cultural offer as well as landscapes / nature and culinary prove to be the most relevant motives. Compared to further destinations worldwide, Italy proves to be on the sixth position, in Europe following the United Kingdom and France. As to the ETC, a study on the image of Europe in North America has revealed that it is associated with history, culture, gastronomy and scenic beauty (but these icons are even more important to US-Americans) and most activities turn out to be according to these interests. The favourite activities include sightseeing, visiting museums and galleries, parks, shopping and good eating.

New tourism products will help to satisfy a growing number of careful and critical travellers searching for authentic experiences. Speaking of perfect products for the Canadian market, the ENIT suggests to combine a product integrating flexible components from the different scopes such as art, monuments, nature, culture, folklore, handicraft and enogastronomy.

The German National Tourist Board indicates for 2009 the United Kingdom as the first, Italy at the second and Germany at the third position for Canadian tourists in Europe. Considering the different regions, again the federal land of Bavaria holds the leading position, followed by Berlin, North Rhine-Westphalia and Baden-Wurtemberg. Canadian tourists in Germany mostly enjoy circular trips.

In Austria, only 2% of the 2007 Canadian overnights took place in Carinthia while 44,4% were generated in Vienna, and more than 17% each in Tyrol and Salzburg. The overnights from Canada have been growing during the last years and one of the reasons could be the involvement of the Canadian tourism company Transat Holidays / Air Transat offering Austria-packages from May until October.



## In the Canadian market, culture and places of interest are integrated into trips to cities in Germany and Europe.

- Canadians visit 3-4 European countries in 10-14 days
- The routes focus on famous attractions, e.g. Neuschwanstein Castle, Brandenburg Gate
- Canadian tour operators express the most interest in cultural highlights for their products
- The press in Canada are open to new themes, e.g. Bauhaus
- Partnerships with Lufthansa, Deutsche Bahn, other national tourist boards and companies outside the travel industry



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## In the Canadian market, culture and places of interest are integrated into trips to cities in Germany and Europe.

- Canadians visit 3-4 European countries in 10-14 days
- The routes focus on famous attractions, e.g. Neuschwanstein Castle, Brandenburg Gate
- Canadian tour operators express the most interest in cultural highlights for their products
- The press in Canada are open to new themes, e.g. Bauhaus
- Partnerships with Lufthansa, Deutsche Bahn, other national tourist boards and companies outside the travel industry



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### 2.3.3 China

Despite its fast growing outgoing tourism flows, already today, China holds the leading position in Asia as a source of international tourists. The European Travel Commission qualifies it as one of the World's fastest-growing outbound travel markets due to the relaxation of restrictions on overseas travel. In 2007, about 41 million Chinese citizens have travelled abroad, but 90% of them have chosen Asian destinations while 5% went to Europe. Among the European countries, Russia (and here mainly the non-European part of the country) turns out to be the destination mostly frequented by Chinese tourists. Germany and Italy are listed within the second group, while Austria follows in the third group of countries. Slovenia, by contrast, is part of the last group of European countries frequented by Chinese tourists. Especially travellers visiting Europe for the first time choose multi-destination trips including generally between three and up to eight countries while repeat travellers rather opt for one or two countries. Italy proves to be a favourite for single-destination trips. These "European tours" often include the main destinations, as in Italy are Rome, Florence, Venice and Milan while France, Switzerland, Austria and Germany constitute further parts of these typical itineraries. In Germany, the majority of Chinese tourists visits Bavaria, followed by Hesse, North Rhine-Westphalia and Baden-Wuerttemberg. Speaking of Austria, 5% of the overnights generated by Chinese tourists were located in Carinthia, while 32,8% were allocated in Vienna (followed by Tyrol with 21,8% and Lower Austria with 16,2%). However, the ETC expects that the trend towards choosing fewer destinations per trip will intensify.

City holidays are highly appreciated, followed by beach holidays and touring trips. Due to the restrictions of organised and supervised groups, the activities of European tourist are mainly focussed on sightseeing and scenic spots (70 - 75%) as well as shopping (55%). The sightseeing of first-time travellers to Europe considers well-known places such as the Buckingham Palace, Versailles or the Colosseum. With regards to the focus of CrossCulTour, it must be pointed out explicitly that remote countryside, ruins and "too many old churches" are being considered as "turn-offs". When it comes to culinary products, Chinese tourists are willing to taste European cuisine but they generally require Chinese food.

The ETC states that visits of France, Germany, Italy, Spain, Greece and Switzerland seem to be very attractive to those Chinese who had not been to Europe yet and that Italy is among the countries they expected to appreciate most.

Regarding the seasonality, July and August constitute the peak season for leisure travel due to the school holidays. Additionally, the three "Golden Weeks" are also appreciated for travel, including the "Spring Festival" (January or February), the "Labour Day" (first week in May) and the "National Day" (first week in October).

Chinese citizens who are interested in booking a leisure journey to Europe depend on the authorized travel agencies to arrange the formalities while there is more freedom for business

travel. Internet, travel agents and personal recommendations are named as the main sources of information on scheduled holidays.

## crosscultour<sup>TRANSROMANICA</sup> Focus on China

- Fast growing outgoing tourism
- Already today leading position in Asia as a source of international tourists
- 90% in Asia, 5% to Europe
- Multi-destination-trips (esp. first visit)
- Sightseeing, scenic spots, shopping
- First-time travellers consider well-known places in Europe such as the Buckingham Palace or Eiffel Tower
- Trend towards fewer destinations / intensified trips
- Remote country-sites, ruins and „too many old churches“ are rather considered as „turn-offs“
- Concentration on more experienced travellers?
- Culinary products: Chinese are often willing to taste but generally require Chinese food
- Leisure travellers dependent on authorised agencies
- Difficulty in generating sustainable and profitable business due to low prices, low yield, multi-destination-tours

11.06.2009, Berlin, Landesvertretung of Saxony-Anhalt



Deutschland  
Das Reiseland 

### Culture in the shape of world-famous attractions meets with great interest from Chinese and Indian travellers

#### China and India

- Popular places to visit on trips to Europe include the Eiffel Tower in Paris, the Colosseum in Rome, Neuschwanstein Castle and Cologne Cathedral, plus Trier for the Chinese because of Karl Marx
- Culture/attractions incorporated into trips to cities and sightseeing tours
- Market-specific interests
  - China: music (Lang Lang, Beethoven, Bach etc.)
  - India: family holidays, theme parks, honeymoons



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The ETC points out, that the Chinese outbound tourism is characterised by low prices, low yield and multi-destination-tours and that due to these facts, it proves to be difficult to generate a sustainable and profitable business in this sector. Nevertheless, the ETC indicates that the stays at budget hotels often lead to disappointment of the Chinese guests and that Chinese tend to be exacting customers. The United States can be considered as a strong competitor for Europe with regards to Chinese tourists.

### 2.3.4 Japan and Arab Gulf States

Regarding Japan with its 127,7 million inhabitants and its outbound travel to Europe, it can be stated that Germany and France constitute the leading destinations, followed by Switzerland, the United Kingdom, Italy and Austria. In this respect, the majority chooses trips with multiple destinations. In Germany, Japanese visitors preferred mainly Bavaria, followed by Hesse, Baden-Wurttemberg and North Rhine-Westphalia. Italy claims to be (in absolute figures) third most important destination for Japanese outgoing tourism following China and Korea and preceding Hawaii, Australia and continental USA. Japanese tourists in Italy mainly visit the five capitals of art (Milan, Venice, Florence, Rome and Naples). Further main destinations are the UNESCO heritage sites as these represent a guarantee for quality from the Japanese perspective and destinations on the discovery of culinary specialities. In this respect, a cooperation with UNESCO heritage sites as well as the development of culinary themes could constitute a mean to attract Japanese tourists to regions apart from the large cities mentioned. The Italian Tourist Board suggests to introduce new destinations and niche products such as opera, musical festivals in general, large events and enogastronomic itineraries combined with visits to museums and works of art.

Outgoing Japanese tourists belong to all social levels and mainly come from important conurbations such as Tokyo, Yokohama and Osaka. In Italy, the majority of Japanese tourists is aged between 50 and 65 years and prefers travelling to the “cultural treasures”, to discover fine food and wine and UNESCO sites. The ENIT points out that the idea of seeing and personally discovering Italian places, products and objects in their original environment constitutes an important motive for Japanese travels to Italy.

Leisure travellers stay at three star hotels or better. Due to the strong Euro, in recent times, accommodation at more favourable conditions are preferred. Although often travelling in groups, individual journeys are increasing among Japanese outgoing tourism. Journeys to Europe mainly take place in April, May and August.

When it comes to the main activities during the journeys to Europe, the ETC names “historic and cultural attractions” (86%), “natural and scenic attractions” (83%), “galleries and museums” (77%), “shopping” (66%) as well as “gourmet sampling” (39%). Japanese are strongly attracted by Europe’s

scenic, cultural and historical attractions. In this respect, preferred products are art, culture, enogastronomy and – although decreasing – shopping.

In Italy, the art cities and UNESCO sites remain the most relevant themes to promote the destination in Europe although enogastronomic itineraries and typical products are also very promising. Besides, niche products like festivals for opera and classical music, large sport events and marriages in Italian ambiance will be promoted.

The most relevant aspects for the travel decision are the demand for security as well as the fear of language barriers, health risks, high costs and the fear of flying. The facts that as per the ETC Japanese travellers are ageing and that there is a growing number of affluent retirees with the time and the financial resources to travel May also influence the conservative booking of long distance trips. These are arranged by tour operators and mainly sold by travel agencies which accordingly are of a particular importance in the Japanese market. As to the Austrian Tourist Board, it is essential to consider the planning process of the tour operators when working on the Japanese market in order to achieve an optimal presentation in the catalogues.



**Cultural interests are weighted differently in the Arab Gulf States**

**Arab Gulf States**

- Cultural tourism plays a secondary role
- Demand is stronger for theme parks, e.g. Europa-Park in Rust
- Market-specific interests
  - Family holidays
  - Medical tourism



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### 3. Results and Consequences for further proceedings in CrossCulTour

*Consequences for further analysis and action in CrossCulTour project italicised, main results shaded in grey.*

#### Growing market Cultural tourism

CrossCulTour moves with the address of culturally motivated day trips and holiday travels of the different sub-segments inland, European and internationally in a **basically growing market**. Among partner regions **cultural tourism is second important tourism segment** following the typical recreational holiday. Culture as the main reason for travelling or as an important activity within a journey constitutes a constant dimension in all sub-segments **(between 20 und 30%)**, internationally probably with a higher percentage. Among international incoming guests cultural motivation might be even higher, depending on the destination (50% of foreign guests in Germany; considerably lower in Carinthia).

#### Inland remains main source market, but growth is to be found in European and international markets

As main growth of tourism market is globally expected outside Europe, to intensify efforts in attracting international tourists has become an important strategic field of action.

<b>Main Markets:</b> Inbound tourism (>=70 Percent)	<b>Day trips</b> (> 70% of visitors to sites, inland and some cross-border markets, predominantly individual as well as approx. 10% of market with group travel and 10% with VFR (percentage related to visitors to sites/ regions can be higher)) <b>Overnight trips (30%):</b> short, city and round trips as well as VFR, predominant inland market
<b>Additional Markets:</b> Incoming Europe (20 %)	<b>Short trips/ cities break/ Round trips/ Study tours</b> (individual and groups) Main Source countries (internal): 1. Germany 2. Italy 3. Serbia 4. Austria 5. Slovenia Further source countries (external): France, Netherlands, United Kingdom Potential for Cross-border-marketing should be used especially in: - Thuringia and Saxony-Anhalt - Serbia and Slovenia - Carinthia and Slovenia - Piedmont and Emilia-Romagna
<b>Future Markets:</b> Incoming Overseas (10%)	<b>Round and Stop-over trips Europe:</b> <b>USA/CANADA, established markets:</b> combination with culinary/regional products, potential for smaller cities, new cultural topics (e.g. Bauhaus or Luther, religion), advanced and high quality products, repeat visits, individual and groups tourism <b>China, emerging market:</b> low yield group tourism, multi country journey to conventional highlight stops (Paris, London etc.), need for special starting points to attract to partner regions, no potential in culinary field

Recent decrease due to worldwide recession is to be seen as momentary effect and not long lasting trend. Graph below summarizes markets by form of trip, countries of origin and relevance for CrossCulTour/TRANSROMANICA network.

Also European markets such as Russia, Poland, Czech Republic have shown growth potential in the near past, same as different countries from Southern or Northern Europe (Spain, Norway, Italy and Sweden). New upcoming international markets besides USA/Canada and Japan, especially from Asia, Latin America and the Middle East are South Korea, India, Brazil, China, United Emirates, Argentina, Malaysia and Indonesia.

**Market analysis<sup>31</sup> secured choice of USA/Canada as important established international market and China as most important quantitative emerging market for the future.**

The challenge with Chinese market is to either find a trigger point to attract tourists to the more peripheral regions of CrossCulTour / TRANSROMANICA or to identify repeat visitors even among Chinese tourists. *PATA actions (WPA 4.5) shall generate further data basis, experience and knowledge for joint international cultural tourism marketing in these two types of markets.*

**Combination of Culture with Culinary, Hiking/Biking and Spiritual Tourism approved**

The findings of market research underline the necessity to combine culture with appropriate other topics ranking **culinary (regional dishes, regional products especially wine)** as most important, even concerning international guests (US, Canada not China). In addition other tourism segments as especially **hiking / biking tourists** also show cultural interest, *which will be addressed by WPA 4.1/4.2 creation of a transnational bike trail. Further market research concerning these combinations have to prepare sound basis for product development (WPA 3.2 G2B-Structure analysis).*

**Cultural tourism experience as 24 hours – quality concept**

As cultural tourists show high expectations concerning their accommodation (hotels, even 4 and 5 star category), appreciate shopping and nightlife, product development within project will have to follow a holistic approach making plans and suggestions embracing all activities during the day. Gaps in service quality and esthetical context should be avoided and product design should derive from regional authenticity. Adequate accommodation capacities will decide upon marketing

<sup>31</sup> Market analysis was being discussed at Steering Meeting II in Berlin: Russian, Indian and Arabian Gulf states tourists were judged to show very low affinity towards cultural topics and have therefore been excluded as alternative.

opportunities of certain destinations (TRANSROMANICA Swot 2005 has shown short comings for several TRANSROMANICA highlight locations).

#### **Cultural tourism marketing as dynamic, event driven and cross-border marketing process**

As cultural tourists tend to continuously search for new experiences (main motif for site visits; low rate of repeat visits among cultural holiday makers) the creation of changing events, exhibitions and festivals even special guided tours is most important. The cooperation within a network enables to attract guests vice versa through Cross-marketing and profit from each other among the partner regions. *Cross-border constellations shall be activated further within product development (WP 4).*

#### **Accessibility as crucial criteria for international marketing of sites / transport sector as important partner for Cross-marketing and product development**

Although several **airports** provide general access to CC / TRANSROMANICA regions, quality and frequency of flights coming from source markets and the existence of low cost carriers will severely influence the attractiveness for international tourism. Furthermore regional accessibility through roads and public transport is essential. Thus product development and cross-marketing will have to search for partnerships among airports<sup>32</sup> and **airlines**<sup>33</sup>, in order to communicate and elaborate competitive products for international market. Hop-on/hop-off tickets are seen as another instrument to connect and cross-market the different CC-regions and their highlights sites. Also **car rentals located at airports** could be used as important POIs (Points of Information) to promote regional cultural tourism offers and itineraries.

Other partners from tourism transport system are **national and regional railways** (ÖBB, DB, HEX), either needed for bridging the gap within transnational biketrail between Thuringia and Carinthia or providing alternative transport to flight (auto train, e.g. new stop near to Asti) and for developing packages.

**Caravan rentals or retailers** were also identified as POI or multipliers for CrossCulTour offers, as they deal with a wealthy and also sightseeing and culturally oriented target group which could be addressed with possible suggestions for round trips or itineraries.

**Bus companies and tour operators** conducting the international Europe trips between the major attraction points for international tourists will have to be contacted in order to investigate

<sup>32</sup> The smaller regional airports such as Klagenfurt, Bologna, Turin, Ljubljana are seen as most appropriate partners as big airports like Berlin, Hannover or Halle-Leipzig might not been as interested and recognition among tourists quite low.

<sup>33</sup> German Wings, Tuifly, Ryanair

*Further research concerning the named actors from transport sector in the concerned partner regions is necessary to identify the relevant partners (see WPA 3.4 G2B structure). Best Practice event and Analysis identified companies of these sectors also as possible Cross-marketing partners (see WPA 3.2 and 2.3.1). They will be interviewed by partners personally (see WPA 3.2 and 3.4)*

#### **Internet as most important tool for communication and promotion, strategic field of action for cooperative marketing with partners**

**Internet** has proved **most important source of information** before travelling among cultural and international tourists (see Q-Monitor Germany 2009 and TRANSROMANICA visitor survey 2005). First choice is the site of the town or site to be visited followed by search engine and homepage of the place of stay (accommodation), than greater region and sites of tour agencies / operators.

*Thus CrossCulTour / TRANSROMANICA will have to improve general quality of partner sites and its own (WPA 2.2) as well as presence of network offers at and linkage with important partner websites. Cooperation in this field should incorporate also hotel companies as place of stay etc.. English translation is obligatory when attracting international guests and should be improved (sub menus, not only headings). The necessity to adapt websites to needs of Chinese tourists will have to be enquired as well as opportunities for using the official European tourism portal - visiteurope.com. The optimal positioning of CrossCulTour and partner websites in search engines will have to be improved by multiple and appropriate linking and the adequate use of keywords in search texts.*

#### **Tour guides as well established and stable information source**

The presence of CrossCulTour/TRANSROMANICA among **Tour guides**, being the POI in second rank, used by cultural and international tourists, should also be improved. *Especially the use of tour guides by US American, Canadian and Chinese tourists will be subject to further investigation (see WPA 3.4 G2B structure and 4.5 PATA Marketing ). **Cooperation with tour operators and agencies** should also incorporate questions of web marketing and linking.*

## **4. Monitoring Scheme**

CrossCulTour aims at establishing a Monitoring System for the main cultural sites involved. With the collection and analysis of visitor data, in a first step this action will enable an overview on the status quo of the present visitor structure and also allow comparisons to further integrated sites. In the medium term, the Monitoring Scheme will also provide a summary of the singular sites' development in terms of visitor structure but also relate this data to the development of the general tourism flows in the community or region (if applicable) and the ones of further participating sites. This frame of reference is highly important in order to evaluate the changes in a

broader context. If cooperation with sites is established successfully, short reports will provide the collected information to the sites.

#### Saxony-Anhalt:

- St. Maurice and St. Catherine`s Evangelic Cathedral - Magdeburg
- Cathedral of St. Sephan and St. Sixtus - Halberstadt
- Collegiate Church of St. Servatius - Quedlinburg
- Ss. Peter und Paul`s Cathedral - Naumburg
- Ss. John the Baptist and Lawrence`s Cathedral - Merseburg
- Ev. St. Mary`s Cathedral and former Premonstratensian Monastery - Havelberg

#### Thuringia:

- Liebfrauenkirche (Church of Our Lady) - Arnstadt
- Wartburg Castle - Eisenach
- Former monastery Church of St. Peter and St. Paul - Erfurt
- Monastery Ruins - Paulinzella
- Reichsburg Castle Kyffhausen - Bad Frankenhausen

#### Carinthia:

- Cathedral - Gurk
- Monastery - St. Paul / Lavanttal
- Monastery - Millstatt
- Medieval Town - Friesach
- Church Peninsula - Maria Wörth

#### Slovenia

- Romanesque Castle - Podsreda
- Church of the Assumption of Mary - Koper
- Cistercian Abbey - Stična
- Parish Church St. Martin - Laško
- Church St. George - Ptuj

#### Modena/Parma

- Cathedral - Modena (Province of Modena)
- S. Silvestro Abbey - Nonantola (Province of Modena)
- Pieve of S. Maria in Castello called La Sagra - Carpi (Province of Modena)
- Cathedral - Ferrara (Province of Ferrara)
- Cathedral and Baptistery - Parma (Province of Parma)

#### Piedmont

- Sacra di San Michele Abbey
- Abbey of Vezzolano
- Basilica of San Giulio
- Basilica of Sant'Andrea - A.T.L. (Agenzia Turistica Locale)
- Sant Evasio a Casale Monferrato - Diocese of Casale Monferrato

#### Further TRANSROMANICA partners

##### Burgundy (France)

- Basilique du Sacré-Coeur, Paray-le-Monial

### Europa Romanica (Spain)

- Ermita de San Baudelio, Casillas de Berlanga
- Monasterio de Santa María La Real, Aguilar de Campoo
- Iglesia de San Miguel, San Esteban de Gormaz
- Santa María de Siones, Burgos
- Church San Clemente de Tahull, Lleida

### Serbia

- Monastery of Zica
- Monastery of Studenica
- The Gradac Monastery
- Monastery of Sopocani
- The Djurdjevi Stupovi Monastery

### Castile-Leon

- Iglesia de San Martín, Frómista
- Colegiata de San Isidoro, León
- Monasterio de Silos, Silos
- Iglesia de San Salvador, Cantamuda

Taking into account that most of the sites scheduled for participation within the Monitoring Scheme have a religious character and a minor focus on tourism, it can be assumed that visitor data is not systematically collected by all the institutions. Regarding the churches, the visitors should also be divided in (local) believers and tourists. Therefore, the first step consists in contacting the sites in order to receive an overview on the available data and to underline the advantages of the Monitoring Scheme. The Monitoring Scheme aims not only at collecting pure visitor numbers but intends to go further by trying to receive further information such as information on foreign guests including guided tours and the offered languages as well as visits of the websites and special events (if available). Overview on the data to be collected (if available):

- Category (museum, church, castle, monastery, miscellaneous)
- Collection of visitor data (yes/no, frequency, method)
- Entrance fees
- Guides tours (yes/no, fees, languages)
- Special Events
- Website (visits, foreign languages)

The intended comparison to the development of tourist flows within the regions obviously depends on the quality of available data. A thorough and optimal comparison between the development of the involved institution and the general development of its environment can only be obtained if according data is available, ideally on the level of communities.

The following table gives an overview on available tourism data in the regions.

Region	Availability of tourism statistical data for purpose of Monitoring Scheme for TRANSROMANICA-Highlights
Saxony-Anhalt	Available on municipality level (but not for origin of tourists)
Thuringia	Mostly available on municipality level
Piedmont	On regional level (circonsrizioni turistiche)
Emilia-Romagna	On regional level (circonsrizioni turistiche)
Carinthia	On municipality level
Slovenia	On municipality level
Serbia	On regional level
Burgundy	On regional level
Europa Romanica	n./a.

## Sources of statistical data

Country	Sources of statistical data in the regions	Sources for information on potential target markets
Germany	Statistische Landesämter Sachsen-Anhalt and Thüringen, Thuringia Tourism, German National Tourist Office	National Tourist Boards of participating countries (Deutsche Zentrale für Tourismus – <a href="http://www.dzt.de">www.dzt.de</a> ; Österreich Werbung – <a href="http://www.austria.info">www.austria.info</a> ; Agenzia Nazionale Del Turismo – <a href="http://www.enit.it">www.enit.it</a> ; Slovenska turistična organizacija – <a href="http://www.slovenia.info">www.slovenia.info</a> ; Market Insights of the European Travel Commission ( <a href="http://www.etc-corporate.org">www.etc-corporate.org</a> ))
Italy	Agenzia Nazionale del Turismo, Regione Emilia-Romagna – Servizio Turismo e Qualità Aree Turistiche ( <a href="http://www.emiliaromagnaturismo.it/new/asstur/stattur.htm">http://www.emiliaromagnaturismo.it/new/asstur/stattur.htm</a> ), Sviluppo Piemonte Turismo	
Austria	Österreich Werbung, <a href="http://www.tourmis.info">www.tourmis.info</a> , Statistik Austria, Kärnten Werbung	
Slovenia	Slovenian Tourist Board ( <a href="http://www.slovenia.info">www.slovenia.info</a> ), Statistical Office of the Republic of Slovenia ( <a href="http://www.stat.si">www.stat.si</a> )	
Further regions	<a href="http://webzrzs.statserb.sr.gov.yu">http://webzrzs.statserb.sr.gov.yu</a> (Statistical Office of the Republic of Serbia), <a href="http://www.insee.fr">www.insee.fr</a> (Institut National de la Statistique et des Études Économiques), <a href="http://www.ine.es">www.ine.es</a> (Instituto Nacional de Estadística)	
All regions and Europe	eurostat ( <a href="http://ec.europa.eu/eurostat">http://ec.europa.eu/eurostat</a> )	

## 5. Policy recommendations

Policy recommendations here are focussed on improvement of market research in the fields of culture and tourism and how the major actors could improve their performance to achieve a better basis for joint action in the future.

### → Facilitation of market research as integrated part of projects

Marketing strategies and their implementation need a sound data base for their elaboration as well for the follow up and controlling procedures. Thus the funding of market research within (cultural) tourism marketing and development projects is extremely important and should be obligatory. Cultural heritage sites and regional tourism associations often lack the resources to analyse the variety of sources and studies available.

### → Raise awareness for need of market research among actors especially in cultural sector and develop instruments for adequate market research

General experience is that tourism associations are experienced and used to employ professional market research for tourism marketing whereas many cultural heritage sites have not yet put their focus on strategic (tourism) marketing and market research. Statistics on visitors to museums and exhibitions among European countries are less developed (see EGMUS European Group on Museum Statistics, 2004, A Guide to European Museum Statistics. <http://www.nemo.org/lasso/uutiset/uutisentiedot.lasso?id=107>) than tourism statistics and due to concealment not displayed on regional levels.

Thus individual tools will have to be developed and promoted in order to improve strategic cultural tourism approaches among touristic and cultural partners. Existing models are:

- Weather stations (“Wetterstationen”) of S-Tourismusbarometer ([www.s-tourismusbarometer.de](http://www.s-tourismusbarometer.de)), with yearly and monthly visitor data of attractions from museums, information centres, monuments, castles etc. in East Germany, Lower Saxony, Rhineland-Palatinate, Schleswig-Holstein, Saarland; reports three times a year inform the participating tourism attractions and tourism organisations about recent results and development trends in visitor numbers
- The developing tool and online system WEBMARK Museen (Austria / Germany; <http://www.manova.at/index.php/de/References/Detail/id/132>), which monitors visitor satisfaction and allows online market segmentation and comparisons among participating attractions

- Singular visitor analysis as e.g. Wirtschaftsfaktor Domschatz Halberstadt, Germany, which aims at measuring the economical effect of the newly opened cathedral treasure by visitor survey and further data research (ongoing project)

**→ Strengthen resources and skills concerning the professional use of market research in cultural sector**

To build up awareness among actors in cultural sector they need knowledge and skills to employ market research and use it adequately for successful development of their sites and institutions. This requires adequate training and further education. The federal state of Saxony just shortly announced a tender on conception and conducting of a comprehensive training on professional tourism management for small visitor attractions in rural areas from different scopes (museums, leisure parcs etc.).

**→ Improve cooperation between cultural and tourism sector through workshops and trainings, establish cooperation structures**

All sorts of workshops, trainings and projects which set up or intensify the communication and cooperation between cultural and tourism sector are highly recommendable. They are needed on all kind of territorial levels.

The foundation of a centralized structure in form of UNESCO Welterbestätten Deutschland e.V. has improved the basis for cooperation between National Tourism Board (DZT) and Cultural heritage. UNESCO has become a major cultural topic among international cultural tourism marketing in Germany, a concerning question was integrated in 2010 visitor survey Qualitätsmonitor Deutschland.

The federal land of Hesse is conducting a project improving the marketing of UNESCO sites in Hesse with regard to tourism which led to regional workshops between local and regional actors from tourism and UNESCO.

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