

First policy report

Smart CulTour

Smart Cultural Tourism as a Driver of
Sustainable Development of European Regions

Deliverable
D1.2



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A

bstract

This report serves as deliverable D1.2 of the SmartCulTour Horizon 2020 project (grant agreement number 870708) which is aimed at supporting regional development in all European regions with important tangible and intangible cultural assets, including those located in rural peripheries and the urban fringe, through sustainable cultural tourism. This report aims to provide an overview of the specific policy recommendations that originate from two particular tasks in the SmartCulTour project: re-conceptualization of (sustainable) cultural tourism and expectations concerning future trends and developments (WP2), and identification of state-of-the-art interventions in cultural tourism towards sustainable development (WP3).

The report starts by recognizing the potential of cultural tourism in Europe and specifically its framing as a driver for sustainable development and smart regional growth. However, due to an ongoing lack of comprehensive evidence on the benefits of cultural heritage and the observation that, in many countries, cultural tourism is not yet adequately measured, the policy report pays attention to two particular issues:

1. The conceptual fluidity of cultural heritage and, by extension, cultural tourism;
2. The lack of structural evidence on the holistic benefits of cultural heritage for a destination.

In this report we first focus on the question of conceptualization, and through analysis of existing definitional frameworks, propose contemporary definitions to frame cultural tourism in all its aspects as: “a form of tourism in which visitors engage with heritage, local cultural and creative activities and the everyday cultural practices of host communities for the purpose of gaining mutual experiences of an educational, aesthetic, creative, emotional and/or entertaining nature” (Matteucci & Von Zumbusch, 2020, p.19).

Secondly, the policy report presents both workflow and results of an extensive case-study analysis on cultural tourism interventions throughout Europe, both in terms of resources used and in terms of generated (or expected) outcomes in order to provide more robust findings on the multiple benefits of cultural tourism. The five main purposes for cultural tourism interventions that were recognized were: (1) to protect, restore, safeguard and promote, (2) to develop and innovate, (3) to interpret, understand and disseminate, (4) to involve and connect, (5) to manage and influence. While the list does not necessarily need to be considered as exhaustive, and can depend on the non-random case study selection, the typology helps in describing situations and challenges that are typical of each intervention category and can therefore inform policy makers on selecting appropriate cultural tourism projects.

At the end of the report, a number of policy recommendations are given, both on conceptualization and operationalization, and on methodological recommendations that can be followed by Destination Management Organizations and policy makers to collect additional primary research data.

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01 Introduction

1.1. Cultural tourism in the European Union

Ever since the institutionalization of leisure tourism and the general rise of global tourism in the 1950s, Europe has been at the leading edge in terms of international market share. In the pre-Covid year 2019, 51.0% of all international arrivals took place within Europe – with 39.7% being attributed to the EU-28 – a percentage that has remained relatively stable in the last decade. In the top 10 of leading international tourist destinations of 2019, five belong to the EU-28 group: France (no. 1), Spain (no. 2), Italy (no. 5), Germany (no. 9) and the United Kingdom (no. 10) (UNWTO, 2020).

The leading position of the European continent with regard to international tourism is driven by a number of geographical, institutional, and contextual factors:

- As a result of its relative geographic fragmentation, a tourist is much more likely to cross a national border and be counted as an international visitor in Europe than, for instance, in the United States or China. Furthermore, the open-border Schengen area, coupled with the introduction of the Euro currency and efficient transportation connections have supported easy intra-European travel. The importance of open borders was readily apparent during the Covid-19 pandemic in 2020 where varying degrees of border closures, testing requirements and quarantine measures led to a strong decrease in international trips in favour of domestic holidays.
- Comprehensive regulation exists within the European Union to ensure an acceptable work-life balance with Directive 2003/88/EC of the European Parliament and of the Council of 4 November 2003¹ concerning certain aspects of the organisation of working time stating an average working time of no more than 48 hours per week (including overtime), ensuring at least 24 hours of uninterrupted weekly rest every seven days, and at least four weeks of paid holidays per year. Together with the statutory minimum wage levels being established in the majority of European Union Member states, this has supported a robust demand for leisure time.
- Throughout its long history, the European continent has held an important position in the rise of democracy, philosophy, science, and trade. The ancient civilizations of Greece and Rome, to name a few, inspired values, traditions, and even legislation that is still relevant today and left behind tangible monumental architectural remains that withstood the test of time. The rise of Christianity in the Middle Ages in turn led to the building of impressive cathedrals and monasteries, while fortified castles and palaces were also built throughout the continent, leaving behind a visible heritage trail. The Early Modern period was signified, for better or worse, as an age of European exploration, conquest and colonization. The opening of such new trade routes and access to foreign wealth, culture and investments further enriched the European continent and established linkages

¹ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32003L0088&from=EN>

to the rest of the world. The 18th century Age of Enlightenment advanced ideals such as liberty, (scientific) progress, fraternity, and a constitutional government, and – among many other things – paved the way for an increased Western individualism which, in turn, formed fertile ground for the Industrial Revolution from the latter half of the 18th century onwards. While other continents have undoubtedly experienced similar advances throughout the ages of human civilization, the advantage of Europe has been that an important part of its cultural artefacts left tangible remains that can be visited and that the outward focus of European nation-states created lasting linkages with the rest of the world.

Given the strong attractiveness of European cultural heritage, it can be assumed that within the leading position of Europe in international arrivals, a significant portion of tourists are at least partially culturally motivated. However, it is very difficult to accurately and fully identify travel reasons, leading us to need to fall back on broad estimates. An often cited number is that approximately 40% of all European tourists choose their destination based on the cultural offerings (UNWTO, 2018). This percentage is based on a survey conducted among UNWTO Member States, with each country estimating the size of the cultural tourism market. However, it has to be noted that different countries use different estimation methods – 32% of responding countries that measure cultural tourism² based the proportion on cultural participation data, 30% on cultural motivations, 15% using both measures, and another 25% using some other measures.

Still, there is an important difference to be made between the level of engagement with cultural heritage and the relative importance it plays in the travel decision, distinguishing between greatly motivated, partly motivated, adjunct and accidental visitors. Lord (1999) estimated, as a rule-of-thumb, that around 15% of tourists could be considered greatly motivated heritage tourists, with a further 30% being partly motivated and 20% considered adjunct visitors that travel for other non-cultural primary motivations. Furthermore, according to Lord, around 20% could be considered accidental visitors that have no specific cultural interest but still end up visiting some heritage attractions during a trip, either by accident or accompanying others. The ATLAS Cultural Tourism Group (n.d.) based their estimate on more reliable visitor surveys and established that around 11% of tourists travel with specific primary cultural motivations.

While exact numbers on the true extent of cultural tourism are thus somewhat hard to establish, three early observations can be made: (a) the amount of international tourists traveling to Europe for cultural (heritage) reasons is significant; (b) for marketing purposes destinations primarily have to aim the message towards cultural tourists that are greatly or partly motivated; (c) for site-management purposes, destinations also need to account for an important number of visitors that might not consider themselves cultural tourists, but who still visit the main known sights as part of a different type of holidaying.

1.2. Cultural heritage as strategic resource

At least partly due to the significant economic effects of tourism – with pre-pandemic estimates assigning 10.1% of European jobs (38.5 million) and 9.5% of European GDP to the direct, indirect and induced impacts of tourism (World Travel & Tourism Council, n.d.) – it is logical that the Council of the European Union identified cultural heritage as a strategic resource. Importantly though, the conclusions of the Council (2014/C183/08) do more than merely underlining the economic impact, but also emphasize the

² It is to be noted that 35% of responding countries did not measure cultural tourism at all.

role of cultural heritage in creating and enhancing social capital and achieving the goals of smart, sustainable and inclusive growth.

The importance placed on cultural heritage as a strategic resource highlights a gradual shift in thinking that is, among others, outlined in the Cultural Heritage Counts for Europe Consortium (2015) report. In early discussions on heritage, the focus was predominantly on conservation and protection, within the concept of patronage where preservation was principally a moral duty borne by a society. Earlier international policies and laws were very much concentrated on the conservation of historic buildings, archaeological sites and works of arts, as can be seen in The Venice Charter of 1964 and the UNESCO 1972 Convention Concerning the Protection of the World Cultural and Natural Heritage. Current trends and contemporary meanings of heritage have increasingly focused on the underlying values and intangible components, shifting towards a more holistic approach towards heritage management, as recognized in the UNESCO 2003 Convention for the Safeguarding of the Intangible Cultural Heritage. The change in discourse from an object or conservation-oriented approach towards a more subject or value-oriented one is seen in the more inclusive cultural heritage definitions proposed today.

Veldpau et al. (2013) recognize how, together with a broadening of the scope of cultural heritage, the topic of sustainability has become more and more ubiquitous in cultural heritage policies since the early 1990s, particularly in combination with a development focus. Today, cultural heritage is often conceptualized as a multiplier for regional economic development, while also being a foundational building block of social cohesion in communities (UNESCO, 2010). In the Hangzhou Declaration “Placing Culture at the Heart of Sustainable Development Policies”, the link is overtly made by proposing culture as a fourth pillar of sustainable development, next to the economic, social and environmental pillars (UNESCO, 2013). Gustafsson (2019) uses Pier Luigi Sacco’s concept of Culture 3.0 to frame this development in thinking from supply-driven conservation with a focus on protection (Conservation 1.0) via an emphasis on conservation and restoration (Conservation 2.0), to eventually a demand-driven conservation praxis (Conservation 3.0) that pays attention to adaptive reuse, regional multipliers and sustainable development.

1.3. Scope and objectives of the policy report

While the potential for cultural tourism therefore seems a given in Europe, and contemporary thinking on cultural heritage has matured to include a wide variety of tangible and intangible resources, as well as cultural and creative expressions with more attention being paid to cultural heritage as a driver for sustainable development and smart regional growth, strategies with regard to cultural tourism development remain somewhat scattered.

As mentioned by the Cultural Heritage Counts for Europe Consortium (2015, p.34) report, “there is a lack of comprehensive and readily available evidence for the benefits of cultural heritage on a European level”, while the UNWTO (2018) report on tourism and cultural synergies noted how 35% of responding countries did not measure cultural tourism. Some immediate problems can be identified:

1. Visitor motivations are difficult to measure. They require face-to-face (or alternatively online) surveying and are seldom singular. People often travel for a varied number of reasons so identifying the unique weight of culture is methodologically difficult;
2. Cultural heritage and, by extension, cultural tourism is conceptually fluid. Our conceptualization of

what constitutes heritage has evolved over time and will not remain static in the future. Yet, a common definitional framework is needed in order to evaluate the effects of cultural tourism on a destination, particularly in terms of its contribution to sustainable development and resilience;

3. Partly as a result of points 1 and 2, the benefits of cultural heritage might be proven more anecdotally than structurally.

In this policy report, attention will be paid to points 2 and 3, the operational problem of measurement falls outside of the scope of this report and will instead be a topic for the second SmartCulTour policy report. In this report we first focus on the question of conceptualization, and through analysis of existing definitional frameworks, propose contemporary definitions to frame cultural tourism in all its aspects. Secondly, we present both workflow and learnings of an extensive case-study analysis on cultural tourism interventions throughout Europe, both in terms of resources used and in terms of generated (or expected) outcomes in order to provide more robust findings on the multiple benefits of cultural tourism. The main objective is to make readers across the governmental spectrum (in particular tourism on the one hand, and culture on the other hand) aware of their potential synergies when adopting a broad lens of culture and approaching it from a supply-driven perspective. For this, the policy report draws heavily from three other outputs of the SmartCulTour project: D2.1 Theoretical framework for cultural tourism in urban and regional destinations (Matteucci & Von Zumbusch, 2020), D2.2 Future of cultural tourism for urban and regional destinations (Calvi & Moretti, 2020), and D3.1 State of the art of cultural tourism interventions (Moretti, 2021).

02 Conceptualization of cultural tourism

2.1. The changing scope of cultural heritage

Article 2 of the Faro Convention defines cultural heritage as “a group of resources inherited from the past which people identify, independently of ownership, as a reflection and expression of their constantly evolving values, beliefs, knowledge and traditions. It includes all aspects of the environment resulting from the interaction between people and places through time” (Council of Europe, 2005). The explicit link made between past and present is mirrored in the EU Work Plan for Culture 2019-2027, where cultural heritage is said to be a manifestation of cultural diversity that is inherited from previous generations and that can serve as a resource for current-day sustainable cultural, social, environmental and economic development (Zygierewicz, 2019).

In terms of heritage categorization, the initial focus of the 1964 International Charter for the Conservation and Restoration of Monuments and Sites (‘the Venice Charter’), the 1965 Constitutive Assembly of ICOMOS, and the 1968 UNESCO Recommendation Concerning the Preservation of Cultural Property Endangered by Public or Private Works, was on immovable cultural property – architectural heritage such as historic sites and features, as well as groups of such structures – and movable cultural collections. A defining moment in cultural heritage designation and conservation came in 1972 with the UNESCO Convention Concerning the Protection of the World Cultural and Natural Heritage (‘World Heritage Convention 1972’) where a terminology was introduced to distinguish between monuments, groups of buildings, and both natural and man-made sites. In 1975, the Amsterdam Declaration of the Council of Europe identified the importance of including social factors of historical towns. A view that was furthered by UNESCO’s 32nd Session of the General Conference in 2003, where the significance to safeguard and protect intangible cultural heritage, specifically oral traditions and expressions, language, performing arts, social practices, rituals, festive events and traditional craftsmanship was recognized through the approval of the 2003 Convention on the Safeguarding of the Intangible Cultural Heritage. The concept of heritage has thus evolved from a physical view on singular structures of historical value to now include both man-made and natural elements, and tangible as well as intangible expressions of culture (Ahmad, 2006).

Probably the most used contemporary classification scheme for cultural heritage is offered by UNESCO (n.d.):

- Cultural heritage:
 - Tangible cultural heritage: consisting of (a) movable cultural heritage (paintings, sculptures, coins, manuscripts), (b) immovable cultural heritage (monuments, archaeological sites, and so on), and (c) underwater cultural heritage (shipwrecks, underwater ruins and cities);
 - Intangible cultural heritage: consisting of oral traditions, performing arts, rituals;
- Natural heritage: natural sites with cultural aspects such as cultural landscapes, physical, biological or geological formations.

The evolving scope of cultural heritage is testament to the fact that heritage is a social phenomenon, both reflective of the society and time in which it is created and of our contemporary value-judgement. As

mentioned by Salazar and Porter (2004, p.3), “the conferring of ‘heritage’ status, commodification, and the marketing of symbols of the past involves an inherent selectivity that promotes certain value systems over others. In a multicultural society, the very act of inheritance itself is problematic.” Even though we have thus seen a gradual change towards increased coverage and representation within the conceptualization of cultural heritage, there are inherent limitations to the creation of typologies and decision-frameworks which are unavoidable.

2.2. Defining cultural tourism

Travelling to what we commonly refer to as heritage sites has a long history, even dating back to the Ancient world and exemplified in the Grand Tours through Europe from the 1600s until the mid-1800s, even though such activities were still largely limited to merchants, traders, soldiers and aristocracy. The organization of ship- and train-based tours of Europe, Egypt, Palestine and the United States by Thomas Cook in the 1860s, with an important cultural heritage orientation, opened up heritage sites towards a more common population (Timothy, 2011). Notwithstanding, only since the 1980s has cultural tourism started to be (academically) recognized as an emerging niche form within international tourism (Richards, 2018).

Since then, cultural tourism has rapidly transformed to a mass market appeal, with cultural tourism in itself fragmenting in a large number of niches, each focused on distinctive assets and/or creative industries. In the scheme proposed by Timothy and Boyd (2003) in Figure 1, the varied nature of cultural tourism becomes clear, categorizing it based on:

- Different types of landscape in which the activity is performed (natural, rural, cultural, urban/built);
- The type of main tourist motivation (ecotourism, heritage tourism, urban tourism, cultural tourism);
- The type of main attraction being visited.

A division to which we might further add the distinction between tangible and intangible heritage forms as attractors and activities in tourism.

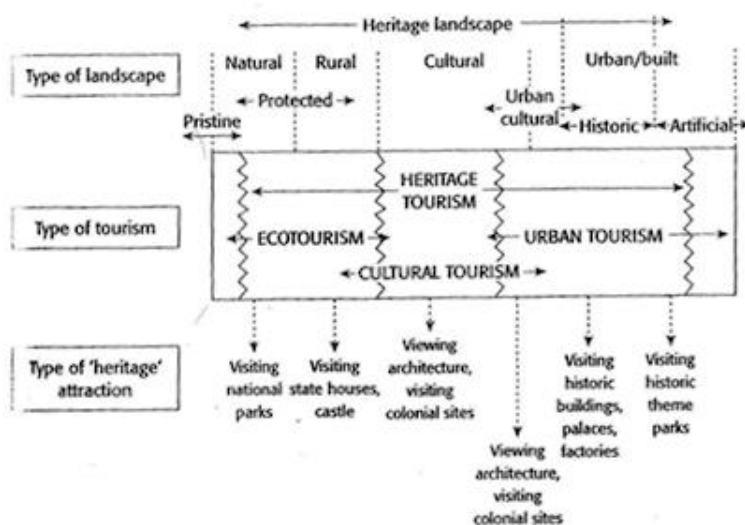


Fig 1. The landscape of cultural tourism (Timothy & Boyd, 2003, p.9)

The figure gives credence to the statement made by commentators such as Hughes (2000) who points out that cultural tourism is often used as an umbrella term that covers several different but related activities, such as heritage tourism, ecotourism, creative tourism, etc. A distinction is then made based on the main tourist motivation or the primary type of cultural resource the visitor connects with.

Given the discussion on cultural heritage presented in 2.1, it is relevant to acknowledge the discrepancy between cultural tourism and heritage tourism which are often considered somewhat separate but largely overlapping, with heritage tourism broadly based upon antiquated relics – its defining feature being something inherited from the past and used and valued in present day – while cultural tourism then referred to as people visiting or participating in living cultures, contemporary art, music and other elements of modern culture (Smith, 2003; Timothy, 2011). As Timothy (2011) mentions, though, the distinction is somewhat artificial and contemporary art and living culture can also be considered important parts of heritage since they are often partly based upon past creative values and can become historical once produced. This is reflected by Ashworth (2010, p.281) who sees heritage as the outcome of past and present “human artistic productivity”, therefore not limited to past elements but also including ongoing artistic work.

The distinction then becomes somewhat arbitrary and we follow Timothy’s (2011) summary of cultural tourism as tourism that encompasses built patrimony, living lifestyles, ancient artefacts and contemporary art and culture. Within the designation of cultural tourism we further identify the concept of creative tourism, which emphasizes active participation in cultural activities and ‘doing’ rather than ‘being there’, often with the goal of enhancing some skills and developing new knowledge about activities, local cultures and local communities (Richards, 2011).

Building on such past conceptualisations, trends in cultural tourism and broader definitions on culture and cultural heritage, within the SmartCulTour project, Matteucci and Von Zumbusch (2020, p.19) have therefore proposed the following contemporary definition of cultural tourism: “a form of tourism in which visitors engage with heritage, local cultural and creative activities and the everyday cultural practices of host communities for the purpose of gaining mutual experiences of an educational, aesthetic, creative, emotional and/or entertaining nature.”

2.3. The relationship between culture, heritage and cultural tourism

The relationship between cultural tourism as a travel motivation and activity, and local culture and heritage – natural, cultural, and intangible – as a resource is at times fraught and uneasy. We consider two main issues at play: differences in value-frameworks and governance issues.

2.3.1. Differences in underlying value-frameworks

First of all, there is a difference in the underlying value-framework. In the past, tourism and culture have mostly been viewed as separate entities, with cultural heritage being seen as part of the resources that contribute to education and providing a foundation for identity-building (OECD, 2009). Tourism came to the attention much more recently and was largely juxtaposed to the day-to-day work life, as a leisure activity. Tourism and cultural heritage have thus evolved rather independently – and at different speeds – whereby cultural heritage is primarily concerned with provision and conservation in a non-profit ethos (McKercher, Ho & Du Cros, 2004; OECD, 2009), while tourism is often seen as a business sector pursuing economic goals.

Secondly, the stakeholders involved in the fields of culture, heritage and (cultural) tourism are of varied nature, often with different priorities. Local and indigenous community representatives, historians, conservationists, tourism operators, property owners, accommodation providers, site managers, and policy makers will have diverse goals and – depending on the distribution of costs and benefits – might see more or less value in connecting tourism with cultural heritage resources. This is also reflected in governmental structures where the policy fields of tourism, culture and heritage often do not overlap. Taking the government structure of Flanders 2019-2024 as an example, culture – including intangible heritage – falls under the prerogative of the Department of Culture, Youth and Media. Tangible heritage, on the other hand, is part of the Ministry of Public Finance and Budget, Housing and Immovable Heritage. Finally, tourism is a subject within the larger Ministry of Justice and Enforcement, Environment, Energy and Tourism. A similar pattern can be observed in the Netherlands, where tourism is part of a broader scope within the Ministry of Economic Affairs and Climate, while heritage and culture reside within the Ministry of Education, Culture and Science. This division is once again reflective of the fact that tourism is still often considered a business sector, while heritage and culture are considered educational. This compartmentalisation complicates cross-policy collaboration to some extent.

Thirdly, building further on the differences in value-frameworks and diversity of stakeholders, while there is recognition in the cultural heritage sector that tourism can support the financial viability, often the costs and benefits are unevenly distributed. While cultural heritage is an important motivation in destination selection and getting a taste of the ‘local way of life’ is increasingly actively aspired to by visitors, tourist expenditure is more imbalanced in favour of the privatized consumptive sectors. This is partly due to the fact that important parts of cultural heritage are in the public domain – which also complicates matters in terms of management since such resources are more vulnerable to overuse.

2.3.2. Governance issues and priorities in cultural tourism

Due to the potential uneven distribution in costs and benefits of cultural tourism, and the many stakeholders involved with different priorities, it is of vital importance to adopt participatory governance systems that empower the variety of stakeholders in planning, monitoring and evaluation processes. The importance of broad stakeholder involvement and cooperation, with local and/or indigenous community representatives, conservationists, tourism operators, property owners, policy makers, etc., is also mentioned by ICOMOS (1999). It is crucial that the tourism sector and cultural heritage managers look towards forming partnerships in order to provide quality experiences for both tourists and residents. From a governmental perspectives, it is furthermore crucial that a level playing field is assured, with a politically imposed power balance whereby development and conservation plans are integrated into destinations’ tourism strategies.

At the same time, parity of power among stakeholders does not automatically lead to equity, welfare improvement and sustainable development. Priorities can still necessitate a more singular stakeholder focus. The issue of governance is most prevalent in the sphere of intangible cultural heritage, which is inextricably linked with communities, groups and, in some cases, individuals as part of a local cultural identity and is more and more sought after by tourists interested in experiencing local ways of life. The risk of commodification or even dispossession of cultural resources is significant and the UNESCO Convention for the Safeguarding of Intangible Cultural Heritage therefore explicitly associates the definition of intangible cultural heritage with the right to self-determination. As article 15 stipulates: “each State Party shall endeavour to ensure the widest possible participation of communities, groups and, where appropriate, individuals that create, maintain and transmit such heritage, and to involve them actively in its management” (UNESCO, 2003). A crucial element to the right to self-determination in a cultural tourism

context is the right of indigenous peoples to manage their own natural and cultural resources for their own benefit. As Disko and Tugendhat (2014) mention, in these cases subsuming indigenous peoples into a wider category of largely equal stakeholders such as local communities, NGOs and other interested parties would negate their status and rights, and within the principles of the UNDRIP, they ought to be treated as rights-holders and key decision-makers whose consent is vital.

Furthermore, within the context of World Heritage sites, UNESCO also recognizes traditional management systems – e.g. land management practices – as part of new management approaches, describing indigenous peoples as ‘stewards’ (UNESCO, n.d.). The concepts of collaboration and stewardship are also proposed by Liburd (2018) as assisting in the creation of resilient destinations. As noted by the author: “stewardship puts an emphasis on the people involved in conservation efforts, and recognises intrinsic as well as personal values and dynamic interrelations beyond selfish gain, while not excluding the latter” (Liburd, 2018, p.25).

2.4. The contribution of cultural tourism to sustainable development and local resilience

In Cultural Heritage Counts for Europe (Cultural Heritage Counts for Europe Consortium, 2015) cultural heritage is recognized to be:

- A key component and contributor to the attractiveness of Europe’s regions, cities, towns and rural areas;
- Providing regions with a unique identity that creates compelling city narratives, providing cultural tourism investment opportunities;
- A source of creativity and innovation;
- A catalyst for sustainable heritage-led regeneration;
- Contributing to the quality of life, providing character and ambience to neighbourhoods, towns and regions;
- Providing an essential stimulus to education and lifelong learning, particularly supporting a better understanding of history and generating feelings of civic pride and belonging;
- Building social capital and helping to improve social cohesion in communities.

As a result of such recognized benefits, cultural tourism has often been adopted as one of the development tools to capture economic and social benefits, often, however, driven by an a priori argument that tourism generates employment, regional multiplier effects and may support the improvement of local infrastructure (Du Cros & McKercher, 2015). Particularly cultural tourism has at times been juxtaposed with mass tourism and been favourably framed as a ‘good’ and ‘niche’ form of tourism that is inherently more sustainable. In such cases, DMOs tend to revert to cultural tourism as a marketing and branding exercise. Given the ample examples of unsustainable growth and development of cultural tourism, it is important to no longer perpetuate the myth that this form of travelling is in essence different from alternative types of tourism in terms of its potential for negative impacts. As mentioned by Jurowsky et al. (2006), economic growth through cultural tourism does not necessarily improve wellbeing for the host community,

particularly when development is rushed and no attention is given to sustainability indicators, quality of life, and the carrying capacity of a destination.

Therefore, notwithstanding the potential of positive contributions made by cultural tourism, these capabilities cannot be taken as a given and require proper understanding, planning and management whereby a sustainable development approach respects the triple bottom line of environmental, social and economic success. UNESCO (2015) suggests the following guiding principles:

- Broad stakeholder cooperation and engagement, particularly empowering local communities and developing participatory approaches that take into account local needs;
- Integration of tourism and heritage management planning into the wider destination context;
- Valuing and protecting the natural and cultural assets and developing an efficient, responsible and sustainable form of tourism.

The aspect of broad stakeholder cooperation and empowerment is also central to the ideas of Liburd (2018) and Weaver and Jin (2016) who note that cultural tourism development based on stakeholder collaboration and stewardship can foster greater societal equity, promote community empowerment, reduce economic leakages, enhance sense of place and place attachment, and preserve the integrity of local cultures. As Matteucci and Von Zumbusch (2020, p.34) put it: “for any sustainable cultural tourism development programme to succeed, multiple stakeholders (including civic society members) need to join the planning table; their concerns and interests need to be heard and respected and any planning and further development step should be driven by reciprocal care beyond self-interest.”

In order to support frameworks for the identification of sustainability and resilience indicators for planning, measuring and monitoring, and to take into account the varied forms of cultural tourism, the inherent governance issues at play and the sometimes fraught relationship with sustainable development, within the SmartCulTour project, Matteucci and Von Zumbusch (2020, p.36) propose an updated definition of sustainable cultural tourism destinations as: “a rural, urban or mixed geographical area in which various institutions, local community actors and culturally motivated visitors interact in a way that contributes to its resilience and the social, environmental and economic sustainability of local development processes for the benefit of all stakeholders, as well as to safeguarding and enhancing the diversity of local cultural resources for future generations.”

03 Trends and future scenarios in cultural tourism

3.1. Frameworks for trend investigation

Building further on chapter 2, and specifically the observation that cultural tourism is not, in itself, sustainable without knowledge, planning, policy and participative governance to support sustainable and resilient development of destinations, an important step needed for proper planning is to establish an outlook on typologies of future cultural tourism and the contexts in which they exist. While elaborating on future scenarios is important, trend forecasting is fraught with uncertainty and complexity.

3.1.1. The VUCA environment

In order to hypothesize about potential futures of cultural tourism, it is needed to take the complexity of the environment and the uncertainty of changes into account. Particularly in the current globalized, interconnected world, local trends can quickly spread and lead to consequences for individuals, economic operators and institutions elsewhere. In Deliverable 2.2 of the SmartCulTour project, Calvi and Moretti (2020) refer to the VUCA-acronym, which stands for Volatile, Uncertain, Complex and Ambiguous environments. Cultural tourism operators and policy makers need to be prepared to deal with a variety of potential disruptive situations that might occur in the macro-environment, in particular disasters and emergencies and disruptive innovations.

While disasters and emergencies will always have a level of unpredictability to them and responses are predominantly reactive, having contingency plans available can significantly improve reaction time and partly decrease the negative effects that will be felt (Cohen & Werker, 2008). Tsai et al. (2016) mention the need for the tourism industry to adopt such specific written policies and recovery plans. In this regard the European Union, the UN Development Group, and the World Bank have developed shared guidelines for conducting Post Disaster Needs Assessments (PDNA) and for preparing Disaster Recovery Frameworks (DRF), also for the tourism and culture sectors.

Apart from (natural and man-made) disasters and emergencies that severely disrupt society as a whole, disruptive innovations are of a more technological and business economic nature and can completely alter the economic framework upon which a destination operates. Examples of past disruptive innovations which altered the cultural tourism market are the rise of Online Travel Agencies which contributed to a decline in the number of traditional agents and a change in general booking behaviour, the introduction of peer-to-peer accommodation platforms such as Airbnb which both altered the competitive sphere of the accommodation sector and are now also increasingly providing cultural experiences, and the rise of 'free guided tours' in the wake of new online and offline social networks (Guttentag, 2015; Meged & Zillinger, 2018).

Given that tourism destinations are dynamic systems, working within a context of instability and volatility, characterized by uncertainty, resilience of destinations to withstand shocks is a critical challenge. Building on Hartman's (2016) concept of diversity, Calvi and Moretti (2020) outline a few main aspects that can help

the resilience of cultural tourism destinations, namely: (a) the enhancement of diversity in businesses, products and cultural experiences, (b) a balance in diversity to avoid uncoordinated development and fragmentation of the tourist offer which would limit the potential for synergies and decrease visibility and brand strength, and (c) governance of the destination that should ensure a degree of cohesion in the cultural offers but still facilitate a certain level of competition and diversity.

3.1.2. Macro-trends and local destination factors

Several macro-trends can be recognized that have shaped the evolution of cultural tourism and are likely to contribute to its future as well. Within the SmartCulTour Deliverable 2.2, Calvi and Moretti (2020) outline four macro trends:

- 1) The role and impact of technology on the tourist experience, which offers opportunities to enhance the experience at cultural destinations. Emerging and immersive technologies such as Augmented Reality, Virtual Reality and 360 degree videos are – also supported by lower roaming costs within the EU – now relatively commonplace and their development has been further boosted by the necessities created by Covid-19. Immersive technologies can add to the tourist experience but can also be used to, for instance, alert tourists to negative consequences or non-appropriate behaviour, as well as increasing accessibility to cultural heritage for people with disabilities.
- 2) Globalisation processes and their impacts, with easier and more affordable global transportation, digital and communication technologies and reduction of border restrictions playing an important role in the global growth of tourism since the 1950s. While tourism is formed (and forms) the globalisation process, it is necessarily consumed locally and this local culture plays a particularly crucial role in cultural tourism. There is an increasing trend to consume an authentic sense of place and while this undoubtedly has created benefits and potential development opportunities for many communities, it has also at times led to commodification, gentrification of neighbourhoods and cultural change or shift at host destinations (Jovicic, 2016).
- 3) Experience economy and its contribution to cultural tourism. Within the transition towards an experience economy, which is also partly linked to a maturing tourism demand, an increasing importance is attached to emotions, feelings, and impressions, rather than purely consumptive products. In this sense, Morgan et al. (2009) identify a shift from the rational to the emotional aspects of consumer decision-making, a transition from satisfying needs to fulfilling aspirations, desires and dreams, and a shift from passive consumption to active participation – as can be seen in the growing importance of creative tourism.
- 4) Changing perspectives on sustainable tourism. Sustainability-thinking has a long history, first popularized by the 'The Limits to Growth' report of the Club of Rome in 1972 and the Brundtland-commission report 'Our Common Future' published in 1987. Global environmental issues have put sustainable development at the centre of the political agenda and tourism has, as an economic sector, followed the trends in the debate. In the case of cultural tourism, the role and contribution of culture in a sustainable development perspective can be noted. Fronted by the efforts of UNESCO, awareness has grown on the contributions that culture – i.e. cultural heritage, the creative industries, local culture and products, creativity and innovation, local materials, cultural diversity – can offer to sustainable development. The debate on sustainable cultural tourism continues to evolve and increasingly focuses on the need for participatory approaches to involve local communities.

While not fitting the description of a macro-trend, evidently the report cannot fail to include the disruptive effect of the Covid-19 pandemic. While the pandemic has strongly impacted the worldwide economy and supply chain across sectors – apart from the obvious severe health and social effects – the tourism industry and the cultural and creative sectors are particularly affected, due to their strong dependence on mobility and personal contact. In the short term, restricted mobility, enforced closures – albeit often with financial support mechanisms – and social distancing measures directly affect the bottom-line and decrease financial viability of institutions and entrepreneurs. Long-term effects on cultural tourism and its subsidiaries remains unclear with Gössling et al. (2020), among other authors, mentioning how the Covid-crisis might have a transformative effect to turn tourism into a more sustainable endeavour.

On the demand side, there have been some noticeable shifts in tourism behaviour and preferences. As Marques Santos et al. (2020) observe from surveys conducted across European countries in 2020, low tourism density and sanitary conditions have become main attributes of destination choice, with travellers preferring outdoor activities and contact with nature, somewhat avoiding bigger cities. While there is still a willingness to travel abroad, there is a higher prevalence of domestic holidays while the duration of trips also decreases. Similar patterns were also found by Corbisiero and Monaco (2021) in the case of Italy. An increased digital adoption has also occurred, ranging from Bluetooth-enabled Corona-alert apps, to QR-scanners, digital reservation tools and online meeting tools. The increased acceptance of such tools can potentially benefit future cultural heritage management through better visitor planning and yield management strategies.

While it is useful to identify and understand macro-trends, such as the ones outlined above, these processes have to be translated to the local contexts in order to measure their influence at destination-level. Clearly, the globalising forces and importance of the experience economy has opened avenues for local – and rural – areas to actively participate in the global tourism economy, leveraging local identities and idiosyncrasies as a tourist product. However, if not properly managed, these might lead to an erosion of the social-cultural fabric of the destination and an increase in resident antagonism towards tourism (Rudan, 2010). In this regard, Urosevic (2012) particularly reflects on the dangers of global forces pushing cultural tourism destinations from a focus on cultural market niches to a standardized mass market cultural experience, therefore underlining the need to link tourism products to a distinct local cultural identity. Although, as aptly remarked by Calvi and Moretti (2020), the emphasis on local cultural identity should not be equated to an isolationist process of cultural tourism development. They specifically mention the regional, cross-regional or even cross-national creative routes and cultural identities as a context for successful collaboration on common heritage, which might be particularly useful for developing European regions.

In general, the effects of globalising market trends can instigate both positive and negative effects and a critical role is played by local governance and the objectives pursued by destination policy makers. Given the historic recognition of tourism and culture as potential drivers for economic development, it is not surprising that earlier neoliberal approaches were followed to capitalize upon culture as tool for tourism development. Also following the earlier discussed trends in the changing perspective on sustainable tourism, successful tourism destinations are increasingly relying on cooperation between stakeholders and particularly integration of the local community in destination governance. Although it similarly has to be noted that ‘participatory governance’ has sometimes been adopted as a ‘buzzword’ in a variety of policy fields, but not necessarily leading to favourable outcomes, at least partly due to a lack of specific practical guidelines on its implementation (Erdmenger & Kagermeier, 2021).

3.2. Scenarios for the future of cultural tourism

In Deliverable 2.2 of the SmartCulTour project, Calvi and Moretti (2020) approach the complexity and uncertainty of forecasting future trends in cultural tourism by linking them to four potential typologies, influenced by both macro-environmental factors and by local contextual factors. The two key dimensions considered by Calvi and Moretti (2020) are: (a) the future evolution of cultural tourism demand, and (b) the predominant type of governance approach. Both dimensions can then be interpreted in terms of two polar extremes:

- On the future of cultural tourism demand: On one extreme, there might be a dominance of ‘fast’ cultural tourism demand focused on consuming local culture as an element of a price-sensitive, standardized tourist experiences. The opposite would be a prevalence of ‘slow’ cultural tourism demand that values authenticity and experiences of local identities and that is willing to pay a premium price.
- On the governance approach: An ‘economy-oriented’ approach that adopts cultural tourism as a tool to maximize the economic benefits, versus a ‘community-oriented’ approach that aims to maximize wellbeing of the entire local community and is linked with prosperity rather than profit.

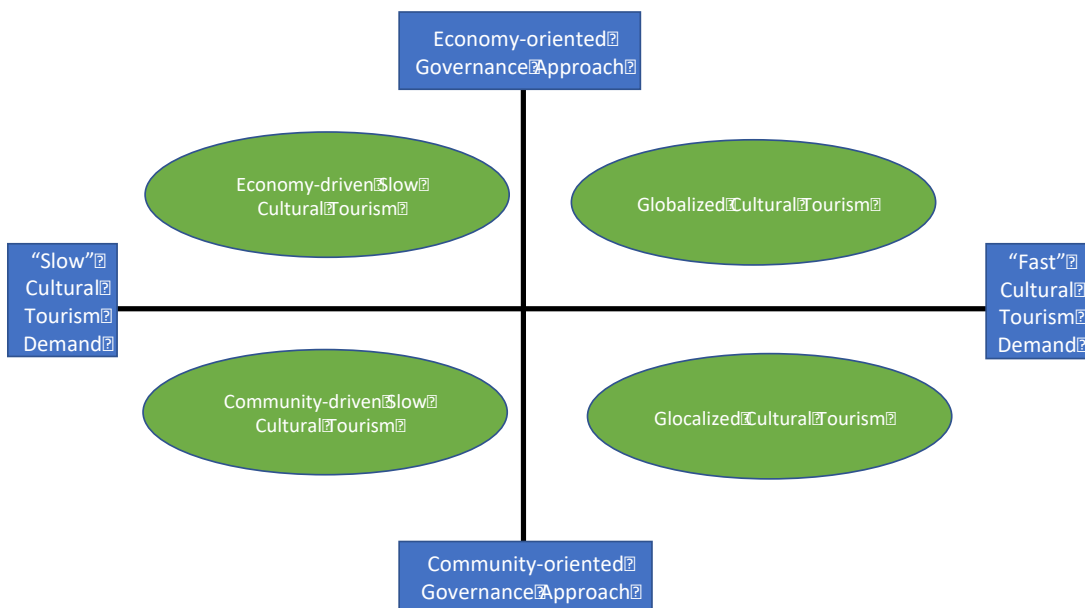


Fig 2. Typologies of future cultural tourism (Calvi & Moretti, 2020, p.67)

As seen in Figure 2, four potential typologies can then be identified:

- Community-driven slow cultural tourism: In this scenario, a slow, experiential tourism demand is linked to a governance approach that is aimed at enhancing the local culture to maximize community well-being. Innovative strategies are used to include the civil society in the decision-making process and the local culture is linked to attractive market segments interested in the authenticity of the offer. While this segment adequately links cultural tourism to sustainable development and community resilience, a risk is the potential small scale of activities that would prevent a significant contribution to the socio-economic development.
- Economy-driven slow cultural tourism: In this scenario, the inclusion of local communities in decision-making is largely absent and cultural tourism planning and development follows a more

top-down approach that is focused on enhancing economic benefits through culture. Entrepreneurship and competitiveness are generally supported, although tourism businesses have to focus on a 'slow' tourism demand that seeks out personalized experiences and cultural authenticity. Businesses will therefore likely include elements of local culture and identity in their offer, even though this might become 'staged'.

- Globalized cultural tourism: This scenario follows a neo-liberal model whereby tourists are seen as largely homogeneous and looking for price breaks and holding a more shallow perspective on authenticity of local culture. Due to an economy-driven governance perspective, bigger segments of the market are targeted with largely commodified cultural tourism products aimed at the 'serendipitous tourists'. Cultural tourism becomes a 'consumption' activity, rather than an authentic learning activity and the supply side will likely be dominated by larger, often multinational, corporations. This scenario holds most dangers for the violation of local carrying capacities, potentially leading to deterioration of the socio-cultural fabric, environmental degradation, and an excessive economic dependence on tourism.
- Glocalized cultural tourism: This final scenario combines a 'fast' cultural demand with a governance approach that focuses on the inclusion and wellness of the entire local community. As a result, the political decision-making process will include strategies for bottom-up participation and cultural tourism initiatives will be led by small-and medium-sized local businesses and community entrepreneurs. However, there can be a demand and supply mismatch, since in this scenario the tourists themselves are not looking for a deep and authentic interpretation and instead likely arrive with a limited knowledge of local culture. A challenging equilibrium might need to be found between partially adjusting the cultural tourism offer to meet a larger, more standardized demand, and preserving authenticity of the local culture in order to avoid alienating the local community.

What ought to be clear is that these scenarios offer rather extreme examples at polar opposites of two axes. In reality, for many destinations with a certain level of maturity, tourism demand will consist of heterogeneous groups of both niche visitors and more price-sensitive, mainstream tourists. Furthermore, governance can fluctuate between a more market-driven and a more community-driven approach depending on subsector and specific projects. It would therefore be an oversimplification to completely frame destinations within a single scenario. Rather, the framework offers insights into potential implications on sustainable development and cultural preservation when certain strategies are followed.

04 Typologies of cultural tourism interventions

4.1. A framework for case study analysis

As mentioned by Hall (2019), among others, even though the concept of sustainable development is widely used and has come to dominate the academic, political and professional debate in tourism, objective empirical measures suggest that on a global level tourism is increasingly unsustainable.

Given that cultural tourism is one of the most prevalent motives for travelling, and similarly cultural tourism – and heritage resources – are seen as both dimensions of sustainability and possible drivers for promoting socio-economic development, it is important to identify current policies, strategies and general innovations within the cultural tourism sphere and their role in strengthening local destination sustainability and resilience within various contexts. Such analytical process can also serve to explicate the positive impacts of cultural tourism interventions, which are often taken at face value, though largely missing empirical grounding.

Such analysis should not limit itself to public governance perspective, but rather take a holistic perspective including supply, demand and governance in order to identify varied stakeholder approaches to sustainability and their translation into practical decisions, actions and interventions. Due to the wide range of cultural tourism actors and the variety of initiatives taken – from novel policies to community-led development, for-profit innovation in cultural experiences, and granted financial resources by a variety of public bodies and NGOs to support research and policy making aimed at understanding, designing and implementing sustainable tourism – there is an urgency to collect standardized insights into impacts and success conditions of such fragmented range of possibilities.

When establishing a framework for structured analysis of a variety of potential cultural tourism interventions, a first necessary step is identifying a generalized concept of ‘interventions’ that includes – but is not limited to public policies. Moretti (2021) identifies three main elements associated with interventions:

- Interventions are generally purposeful: There is an objective intended to be achieved to reach a desired outcome;
- An intervention is planned, initiated (and sometimes evaluated) by an actor interested in achieving the desired outcome;
- Interventions take place in complex settings and involve multiple events and processes, requiring specific resources in order to be effective in achieving the desired outcome.

Following this understanding, Moretti (2021, p.5) proposes the following definition for a cultural tourism intervention in Deliverable 3.1 of the SmartCulTour project: “A purposeful action planned and conducted by public institutions, NGOs, private organizations, local community actors and individuals, or any form of collaboration/partnership among them, that, in the complex framework of cultural tourism management

either proved to contribute or was designed to contribute (or is designed to contribute, if still ongoing) to the socio-cultural, environmental and/or economic performance of an area where cultural tourism takes place.”

The conceptual framework proposed for an analysis of a broad range of cultural tourism interventions is then as follows: Interventions are framed within a local context, are initiated by certain cultural tourism actors with clear objectives and needing internal – and most often supporting – resources. Given particular, often case-specific success conditions, an intervention can have potential positive or negative impacts on the economic, social, cultural and environmental sustainability dimensions. Depending on the strength and direction of these impacts, successful interventions are then those that contribute to the sustainable development and/or resilience of a destination – the latter being defined from an economic (e.g. diversifying or expanding sources of income), a social (e.g. strengthening community networks and relationships), a cultural and knowledge (e.g. expanding knowledge, skills and availability of cultural resources), and a governance (e.g. strengthening the effectiveness and efficiency of governance infrastructure) perspective.

The SmartCulTour project adopted the following methodology, which can be replicated by other institutions, governmental bodies and other parties interested in comparative research:

1. A structured template/form was used for the collection of data on each case study, consisting of four main sections (the full form can be found as an annex to SmartCulTour Deliverable 3.1):
 - General information: basic description of the intervention, the context in which it was implemented, the initiators, funding parties, and other relevant stakeholders involved;
 - Objectives: the objectives, main focus and essential core of the intervention;
 - Impacts: the expected, perceived and/or measured positive or negative impacts of the intervention;
 - Additional information and sources;
2. Consortium partners were assigned different geographic regions;
3. Via desk research, preliminary analysis on a large number of case studies was conducted;
4. Through a bottom-up content analysis approach, meaningful patterns were identified to come to a taxonomy of intervention types;
5. Defining characteristics of interventions with taxonomies were identified to investigate similarities and differences.

4.2. A taxonomy of cultural tourism interventions

4.2.1. Proposed taxonomy by essential purpose

The taxonomy proposed in Table 1 was generated through bottom-up analysis of the database of 107 collected case studies. While the categorization is to some extent dependent on the choices made by the consortium partners during the data collection, the taxonomy can be a valuable instrument for destinations and stakeholders in general, in order to interpret and analyze cultural tourism interventions in a variety of settings and invite them to both be inspired by the state-of-the-art and be aware of the need to establish clear goals, consider success conditions, resource needs and impact measurement – which can all be of

slightly different nature depending on the specific categorization of an intervention. Logically, the taxonomy has to be seen as a flexible instrument and grey areas do exist whereby interventions can often have a substantial meaning for multiple purposes and scopes.

Table 1. A proposed taxonomy

Main taxonomy by essential purpose	Scope of the intervention	Elaboration on typology
To protect, restore, safeguard and promote	<ul style="list-style-type: none"> - Tangible cultural heritage and repositories - Intangible cultural heritage - Contemporary creative and cultural expressions/activities 	Interventions within this category mainly aim at mitigating the fragility of cultural tourism resources and ensuring that cultural heritage and contemporary and creative cultural expressions keep serving as important assets for the identity, cohesion and inclusion of a community, and as elements of attraction for tourists.
To develop and innovate	<ul style="list-style-type: none"> - Skills and professional knowledge - Products and experiences 	Interventions aimed at developing and innovating the cultural tourism offer by, for example, launching, innovating or adjusting cultural tourism products as a way to catch opportunities and overcome challenges.
To interpret, understand and disseminate	<ul style="list-style-type: none"> - Tangible cultural heritage and repositories - Intangible cultural heritage - Contemporary creative and cultural expressions/activities 	These interventions highlight the need for appropriate interpretations and understanding of cultural heritage and creative and cultural expressions. A particular context for such interventions is the presence of neglected or dissonant heritage.
To involve and connect	<ul style="list-style-type: none"> - Visitors and locals to cultural heritage - Cultural heritage located in different places - Destination stakeholders to form partnerships 	Interventions in this category stress the pursuit of enhanced connections with cultural experiences by either: connecting people (visitors and locals) to cultural heritage, connecting different cultural heritage sites within an overarching narrative, or connecting people to people and forming meaningful partnerships among stakeholders.
To manage and influence	<ul style="list-style-type: none"> - Destinations’ strategies and plans - Visitor’s behaviour and actions - Quality and features of the offer 	These interventions focus on tourism destination management, particularly in situations where resource sustainability concerns have become apparent. Projects aim to pursue a more balanced and sustainable form of cultural tourism via strategies, policies and regulations.

Source: Moretti (2021)

Some generalizing observations could be made from the complete dataset of 107 interventions. Although it has to be stressed that a self-selection bias is present since the selected cases were at least partly chosen for their exemplary state. In terms of initiating actors, public entities were the driving force in roughly half of the selected case studies, with around 20% being initiated by private businesses or public-private partnerships (PPP) and the remaining 30% started by NGOs or other non-profit actors. About half of the selected interventions also involved the local community in design, planning and/or implementation – although this participation could range from low-intensity collection of resident opinions to more active participatory government approaches. Well over half (60%) of the studied cultural tourism interventions

received national or local public funding, while more than 30% were at least co-funded by the European Union as well. A minority of 20% were funded or co-funded by the private sector.

Most of the interventions claimed significant positive impacts on one or more of the identified stakeholder groups – i.e. cultural service providers (e.g. museums), private business operators offering cultural tourism services (e.g. guides), other providers of tourism services (e.g. food and beverage, accommodation), tourists and visitors, local community actors, others – with only 15% of the studied interventions not recognizing any significant positive impact. In 16% of the cases, some negative impacts were recognized, predominantly for the local community. In terms of contributions to sustainable development goals, only 13% of the case studies reported no significant impacts on any dimension – defined as economic sustainability, socio-cultural sustainability, environmental sustainability, intercultural dialogue and cooperation – while conversely 18% of interventions impacted all four pillars. Socio-cultural sustainability was, unsurprisingly, mentioned as the most impacted dimension, in 75% of interventions, followed by economic sustainability (60%), intercultural dialogue and cooperation (43%) and environmental sustainability (38%). One important limitation to note is that in most cases (55%), impacts – either positive or negative – were not measured formally or consistently, therefore relying more on qualitative observations and expectations in the judgement of impacts. Only 5% adopted a quantitative approach, with 19% of interventions adopting qualitative criteria and 21% reporting a mixed use of quantitative and qualitative indicators.

4.2.2. Characteristics of different typologies

For a full breakdown of the characteristics of each typology we refer to Deliverable 3.1 of the SmartCulTour project (Moretti, 2021). In this section we limit ourselves to similarities and differences across typologies in terms of initiators and funding resources, as well as main impacts of the interventions. Table 2 provides an overview of initiators across the interventions categorized within the five typologies. While public actors were – as a whole – initiators of about half of the interventions, there are notable differences across categories. The role of public administrations in project initiation was by far the largest for those interventions aimed at protection, restoration, safeguarding and promotion (70%). This is not surprising, considering that such interventions often entail physical structures with large costs of restoration and maintenance. Similarly, the role of public actors – at least in the initiation phase – was relatively larger in projects aimed at managing and influencing visitor flows to cultural heritage sites. This can be related to the fact that visitor management often takes place on a larger scale than a single attraction and can require actions in the public space. Similarly, public bodies have particular interests in supporting communal life, involvement and (cultural heritage) participation, and incentivizing the protection of historical narratives, naturally leading to their rather larger involvement in interventions that aim to involve and connect (53%) people with cultural heritage.

In comparison, private businesses play a lesser role as initiators, however, they are notably more involved in cases aimed at developing and innovating (21%) the tourism product, in projects focused on interpretation, fostering understanding and dissemination (14%) and interventions aiming to involve and connect (16%). Particularly the first typology is more clearly linked to a for-profit incentive of development. Their relative stronger involvement in the other two categories can also partly be linked to marketability and communication techniques – e.g. thinking of VR and AR applications, offering guided tours on dissonant and sometimes hidden heritage, etc. – as well as the fact that interventions under these categories are less investment-heavy than restoration or visitor management projects. Public-Private Partnerships follow somewhat similar patterns to the involvement of private businesses, with a particular focus on development and innovation (17%). Conversely, the scope of NGOs seems rather different, with a

primary involvement in interventions aimed at interpretation, understanding and dissemination (29%), as well as interventions to involve and connect (32%) people with culture and heritage. NGOs thus seem to be more involved in projects focusing on inclusivity and representation of (vulnerable) local community groups.

Table 2. Differences in project initiators

Initiators	Total Database	Intervention typologies:				
		To protect, restore, safeguard and promote	To develop and innovate	To interpret, understand and disseminate	To involve and connect	To manage and influence
Public actors	50%	70%	33%	29%	53%	58%
Private businesses	11%	7%	21%	14%	16%	4%
PPP	7%	3%	17%	14%	0%	8%
NGOs	21%	17%	4%	29%	32%	17%
Others	11%	3%	25%	14%	0%	13%

Source: Moretti (2021)

Funding of interventions somewhat follows the patterns of project initiators across the different typologies. In general, though, it is clear that most of the studied interventions did require one or more forms of public support – either through local or national funding programmes or through EU-programmes. It seems that, at least within the 107 interventions in the SmartCulTour project, novel business models were still rare and funding of cultural tourism projects largely followed a traditional approach of top-down support. Although some of the studied examples had been initiated through private initiatives and means, with public support being sought later for upscaling of the project. This reveals that upscaling of initiatives – even those deemed successful – remains challenging without subsidies. As Table 3 indicates, public funding on national, regional or local level was particularly prevalent in interventions aimed at protection, restoration or safeguarding and promotion of heritage (70%). Since preservation, restoration and conservation of tangible heritage can be a very expensive process, requiring professional and technical skills, this is of little surprise. Furthermore, since monumental heritage is often an important attractor for visitors but is at least partly consumed passively – e.g. when strolling through the historic centres of European heritage cities – a return on investment would primarily come through the tourism multiplier via the visitor spending across local businesses. This means that private incentives for such investments might be lacking since the benefits are accrued externally. The only typology where public funding seems to play a comparatively smaller role is in projects aiming to involve and connect (47%); this may be due to the fact that such interventions partly revolve around narratives and communication, which accrue less fixed costs. EU-funding followed a similar pattern to national public funding, being particularly found in the first three types of interventions. As could be expected, apart from being less dominant, private project funding was also found more in different types of interventions. Private financing was less likely in the first type of protecting, restoring, safeguarding and promoting (10%) cultural tourism resources, while being above averagely focused on interventions to interpret, understand and disseminate (29%).

Table 3. Differences in project funding

Funding	Total Database	Intervention typologies:				
		To protect, restore, safeguard and promote	To develop and innovate	To interpret, understand and disseminate	To involve and connect	To manage and influence
Public	61%	70%	63%	64%	47%	61%
EU	32%	33%	32%	36%	12%	21%
Private	19%	10%	19%	29%	16%	14%
Donations	5%	10%	5%	7%	11%	0%
Other	25%	23%	25%	29%	21%	32%

Source: Moretti (2021)

Different types of interventions also tended to produce somewhat different impacts. The direct economic impact of preserving and restoring activities is often limited. Instead, widespread economic impacts – in terms of income, jobs and business opportunities – are often related to the tourism multiplier effect since the cultural resources, once they have been protected, restored or safeguarded, can be used for destination promotion. Apart from potential positive indirect economic effects, restoration and safeguarding initiatives also tend to have substantial positive social impacts by reviving the areas or sites where the initiative took place.

The observed and expected impacts of interventions aimed to develop and innovate include potentially substantial direct economic benefits for the initiators, as a result of breaking the status quo and/or being able to cater to more cultural tourists and niches.

The interventions that aimed to interpret, understand and disseminate usually generated limited economic impacts, primarily limited to a few individuals or businesses. However, since the spatial scope of these projects was generally small (e.g. districts, neighbourhoods, heritage sites), even relatively small impacts can be a starting point for economic revival and further upscaling might lead to broader positive economic impacts. Notwithstanding, within this category of the taxonomy, socio-cultural impacts are most significant, particularly an increasing sense of community and a strengthening of social cohesion. In the case of contested cultural interpretations of the past, interpretative processes might even help to come to terms with fractured elements of a community’s past. Nevertheless, it has to be noted that in such situations, interpretative processes might generate the risks of new frictions within a divided community.

Within the interventions that sought to involve and connect, the observed and expected impacts principally relate to strengthening the stakeholder-heritage networks, thus improving the socio-cultural resilience of a destination. A strengthened stakeholder network can then further translate into the development of sustainable cultural tourism offerings, determining new business opportunities, and general economic benefits such as local jobs and income. Nevertheless, also in this category, economic impacts appear secondary to socio-cultural ones.

According to Moretti’s (2021) analysis of the 107 case studies, the interventions that focused on managing and influencing the demand-side of cultural tourism are generally grounded in a more socio-cultural or environmental concern, attempting to mitigate an excessive tourism pressure. On the other hand, the impacts of interventions focused on the supply-side can be varied, depending on the scope of the action. Certain regulations on businesses and – for instance – protection of intangible cultural heritage expressions

predominantly have socio-cultural impacts, while interventions aimed at ensuring quality standards of the tourism offer can translate into more substantial economic impacts. Cultural tourism development plans, projects and strategies most often attempt to balance the interests of a multitude of stakeholders and try to manage complex destination systems, thus impacting socio-cultural, economic and environmental dimensions.

05 Policy recommendations

From the work delivered so far in the SmartCulTour project under WP2 and WP3, the following policy recommendations are considered. These recommendations are linked to the conceptualization of cultural tourism, and the identification and operationalization of cultural tourism as a driver for socio-cultural and economically sustainable impacts.

Table 4. Policy recommendations

Dimension/ Subject	Conceptual and operational recommendations	Methodological recommendations
Common and up-to-date definitional framework of cultural tourism	<ul style="list-style-type: none"> ■ Use broad and updated definitions of cultural tourism, both covering heritage-related and contemporary travel motives. This also entails adopting a holistic – systems thinking – approach to tourism development and bridging the departmental boundaries of (local) policy environments. ■ Explicitly distinguish between cultural tourism and sustainable cultural tourism and do not take sustainability as being intrinsic to cultural tourism behaviour. 	<ul style="list-style-type: none"> ■ Adopt semi-frequent trend watching and/or scenario-based analysis in order to identify potential changes in cultural tourism demand and improve the robustness and resilience of a destination.
Identification of cultural tourism impacts across typologies and contexts	<ul style="list-style-type: none"> ■ Use established typologies, recognize the contextual dimensions matching the reality of a destination and critically identify the ‘reason why’ of an intervention as well as necessary initiators, financial backers and other key stakeholders. ■ Be aware of opportunities and limitations of participatory governance and do not use it as a ‘buzzword’ for community participation. 	<ul style="list-style-type: none"> ■ Perform occasional structured case study analyses of best practices in order to understand opportunities and limitations of intervention types across typologies and contexts of which a destination or series of destinations can learn.

5.1. Common and up-to-date definitional framework of cultural tourism

5.1.1. Adopting updated definitions and approach cultural tourism holistically

The second chapter of this report, and Deliverable 2.1 of the SmartCulTour project in general (Matteucci & Von Zumbusch, 2020) focused specifically on the evolving nature of the cultural heritage and cultural tourism concepts. Clearly, since the early beginnings of the supra-national cultural heritage conventions, the concept of what constitutes heritage – and how it relates to tourism – has become wider and more inclusive. Contemporary definitions of cultural tourism should sufficiently cover both heritage-related and contemporary travel motives – e.g. experience the local ‘lived’ culture and participating in creative expressions. Sometimes there is a tendency whereby cultural tourism is split into a variety of niches. While this split may be helpful for marketing and communication purposes, an organization across narrow niche typologies obfuscates the reality that tourists seldom travel for a singular motive and generally see a destination as an interrelated system of related systems to be ‘consumed’. A more holistic approach to cultural tourism is needed, which also necessitates cooperation across departmental boundaries in local policy environments. Such policy boundaries have, to some extent, been fractured along resource types, often distinguishing between tourism as part of an economic system, culture as belonging to education and local identity, and natural resources as falling under the umbrella of environmental management. While such a division is sensible, cultural tourism as an activity bridges all these fields and therefore needs to be approached through inter-agency cooperation. It was noted by policy makers in a study on the local policy responses to Covid-19 (Vanneste et al., 2021) that the emergency pandemic response had led to an improved collaboration across departments in the surveyed cities. However, it remains to be seen whether this collaboration can continue at the same level in an after-pandemic reality where individual objectives might again take prevalence over shared goals.

Holistic thinking is not only needed on a policy level, but it is also needed within the wider tourism sector. Socioecological systems like tourism destinations are ever changing and are themselves embedded within wider complex systems, which are likewise affected in various ways by many forces. Managing destinations, therefore, does not only involve tourism-related elements but also characteristics and issues of a destination, which lie outside of tourism (Koens et al., 2018). Adopting complex system thinking can "serve to move beyond narrow sector focus in favour of dynamic, holistic understandings of sustainable tourism development that are informed by peoples' values and perceptions" (Liburd, 2018, p.14). In complex system thinking, adequate tourism policies and governance models, as well as private cooperative networks, necessitate the inclusion of a multiplicity of local stakeholders in decision-making processes (Matteucci, Nawijn, & von Zumbusch, 2021).

5.1.2. Distinguishing between sustainable cultural tourism and cultural tourism

As a minor policy recommendation, it is observed that in many cases cultural tourism is still adopted as a ‘brand’, implying an intrinsically ‘good’ form of tourism, juxtaposed against the excesses and unsustainability of mass tourism. In reality, however, due to the varied nature of cultural tourism and cultural tourism motives, as well as the large scale at which it is performed, many manifestations of cultural

tourism have led to unsustainable local situations. It is therefore needed to explicitly distinguish between sustainable cultural tourism, and cultural tourism in general, and not just consider the attraction of culturally motivated tourists as the end-goal towards sustainable management from the perspective of local and national DMOs. Matteucci and Von Zumbusch (2020, p.36) therefore define sustainable cultural tourism destinations specifically as: “a rural, urban or mixed geographical area in which various institutions, local community actors and culturally motivated visitors interact in a way that contributes to its resilience and the social, environmental and economic sustainability of local development processes for the benefit of all stakeholders, as well as to safeguarding and enhancing the diversity of local cultural resources for future generations”, thus enhancing the concept from a purely demand-motivated travel typology to a concept that implies local cooperation and integration, resource protection and conservation, and shared benefits.

5.1.3. Trend watching and scenario-based analysis

In order to plan for a sustainable and resilient destination, it is important to be aware of societal changes happening now and trends influencing the future – both on a general socio-economic level and on a tourism-specific level. While the Covid-19 pandemic was unexpected in its origination and disruptive nature, the pandemic has produced some noticeable shifts in tourism behaviour and cultural resource management – both short-term and potentially longer term. The digitization of heritage, the adoption of artificial intelligence, virtual reality and reservation systems have been introduced and developed faster than would have otherwise been the case and these have the potential to change – and maybe improve – site management. At the same time, temporary lockdowns and closures of cultural heritage sites and creative and artistic exhibitions have put in doubt the financial viability of some cultural resources, while in some cases tourism demand has shifted from well-visited (often urban) attractions towards nature-based experiences and resources, causing – to some extent – a redistribution of incomes, but also a temporal and geographical change in tourism pressures. Furthermore, a changing composition of the tourism market – from global to domestic – may reveal that total tourism numbers might have recovered, but that tourism expenditures remain lagging behind due to differences in expenditure patterns.

While an event such as the Covid-19 pandemic could not adequately have been predicted and prepared for, its impacts are worth to be considered in the long term, along with other socio-cultural trends – e.g. related to climate change adaptation. While forecasting and scenario-planning is fraught with difficulties, tourism destinations should perform these exercises on a regular basis in order to pre-empt management solutions. This can be performed by change psychologists and trend analysts who base themselves on insights, case studies and projections of international networks in order to identify megatrends – trends that steer societal development and have large societal impacts – macrotrends or consumer trends – related to ways in which organisations respond to human needs – and microtrends – the final, tangible products and services resulting from macrotrends (Toerisme Vlaanderen, 2021). Deliverable 2.2 of the SmartCulTour project (Calvi & Moretti, 2020) focused on such megatrends and associated societal responses to try to map the cultural tourism of the future. However, the results of this exercise should not be seen as static and are instead an invitation for destinations to continuously revisit progressive trends within a structure analysis.

5.2. Identification of cultural tourism impacts across typologies and contexts

5.2.1. Using established typologies and recognize contextual dimensions of a destination

The central element of WP3 of the SmartCulTour project was the adoption of a large case study collection and analysis to identify types of (successful) cultural tourism interventions, the contexts in which they were adopted and their critical success conditions and impacts. The five main purposes for cultural tourism interventions that were recognized were: (1) to protect, restore, safeguard and promote, (2) to develop and innovate, (3) to interpret, understand and disseminate, (4) to involve and connect, (5) to manage and influence. These main purposes could of course still have multiple scopes (as described in Table 1 of this report). While the list is not exhaustive, because it is based on a non-random selection of case studies, the typology does help in describing situations and challenges that are typical of each intervention category.

Destinations with development plans for cultural tourism can consider their relevant context and reflect on the rationale for a potential intervention. As was briefly discussed earlier in this report, depending on the primary intervention outcome, differences in initiators, necessary financial resources and expected impacts were found. If the expected impacts do not ultimately align with the needs of the destination, its community and its stakeholders, the destination ought to reconsider if the ‘reason why’ is accurately defined and sufficiently covered by the potential intervention. Through such confrontations between potential destination interventions and expected impacts, progression can be made to narrow down initiatives towards interventions that fit the objectives, destination context, available resources and preferred impacts. An overview of successful case studies can assist in identifying further necessary stakeholder contributions, resources and expertise, and necessary steps for implementation.

A general observation to be made from the case study analysis in Deliverable 3.1 (Moretti, 2021) is the prevalence of the public sector, both as initiator and provider of financial support. Possibly with the exception of interventions aimed at developing and innovating the cultural tourism product, other purposes seem less likely to generate a sufficient return on investment from a private sector perspective. Either projects remain small-scale in scope, not leading to particularly strong sustainable impacts, or the public sector needs to intervene in providing resources for upscaling. Unless new business models can be found, this reality seems difficult to change, since a main characteristic of cultural tourism resources is that they often take the form of public goods, or form a small but essential part of destination attractiveness, whereby a majority of economic benefits flow to the wider local economy, rather than directly supporting the initiators.

5.2.2. Identifying opportunities and limitations of participatory governance

One aspect that was often mentioned within the selected case studies, and which reflects contemporary thinking on sustainable development, is the idea of community participation. This has led to a situation in which participatory governance is sometimes seen as a ‘buzzword’ within a variety of policy fields. Cortés-Vázquez et al., (2017, p.1) suggest how “in the heritage field, institutions tend to see social participation as a synonym for good governance practice”. The authors focus on a series of Spanish examples of unsuccessful implementation of participatory governance, where elements such as pre-existing social fractures within the community and different power relations between stakeholders did not allow to achieve the desired results. Erdmenger and Kagermeier (2021) advocate for a better understanding of the

needs and opinions of local communities, particularly whether they are actually motivated to participate in tourism governance. Their empirical study concluded that local residents are not very interested in actively engaging in what academics would call ‘participatory governance’, mainly because they could not see any direct personal benefit coming out of the process. These authors, however, do not criticize the concept of participatory government: in fact, they acknowledge the value of participatory governance for the development of tourism projects that are socially acceptable. Instead, they advocate the necessity of embracing approaches that start from the perspective of the local community on ‘if and how’ they would be willing to be involved in decisions concerning tourism development. Then, if necessary, work on the knowledge and awareness of the local community, so that they can make an informed decision whether they want to be involved or not.

5.2.3. Case study analyses of best practices

Finally, a recommendation is made on methodological grounds, linked with the topic of 5.2.1. In order to pre-empt impacts and trends, and to understand critical success conditions for a positive impact towards sustainable cultural tourism development, it is useful to invest time and resources in identifying best practices across Europe. This is achieved by identifying typologies of interventions and framing their success potential within the local context. Deliverable 3.1 of the SmartCulTour project (Moretti, 2021) describes a stepwise approach towards such a case study analysis, broadly consisting of:

- Setting up structured template/form which allows for the collection of directly comparative data across case studies. An example of such a form can be found in Appendix 1 of Deliverable 3.1 of the SmartCulTour project and should consist broadly of:
 - General information: basic description of the intervention, the context in which it was implemented, the initiators, funding parties, and other relevant stakeholders involved;
 - Objectives: the objectives, main focus and essential core of the intervention;
 - Impacts: the expected, perceived and/or measured positive or negative impacts of the intervention;
 - Additional information and sources;
- Selecting various geographic regions on which to conduct the analysis and using a proposed taxonomy to selecting interesting case studies;
- Conducting a preliminary analysis via desk research of publicly available documents and resources;
- Additionally (if wanted), conducting an analysis of primary data, through interviews with relevant stakeholders of case studies considered to be particularly interesting;
- Identifying meaningful patterns and characteristics across intervention types and considering whether the results warrant the proposition of additional intervention types to the taxonomy that was used.

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