Agriculture and Rural Development

Culture and Education

Fisheries

Regional Development

Transport and Tourism

INDUSTRIAL HERITAGE AND AGRI/RURAL TOURISM IN EUROPE

STUDY

INDUSTRIAL HERITAGE AND AGRI/RURAL TOURISM IN EUROPE

STUDY

This document was requested by the European Parliament's Committee on Transport and Tourism.

AUTHORS

Bernard Lane
Institute of Transport and Tourism, UK – Richard Weston, Nick Davies
Elisabeth Kastenholz
Joana Lima
Janusz Majewsjki

INDUSTRIAL HERITAGE AND AGRI/RURAL TOURISM IN EUROPE

A review of their development, socio−economic systems and future policy issues

STUDY

Abstract

This report provides a description and analysis of how, why, when and where industrial heritage based tourism and rural tourism have developed in Europe. It discusses current issues in those subjects and suggests ways in which both activities could be expanded, made more viable and sustainable, and so deliver greater economic, environmental and socio-cultural benefits for the local communities involved and for Europe as a whole.

CONTENTS

LIST OF ABBREVIATIONS

ACORP	The Association of Community Rail Partnerships (UK)
ADXTUR	*Agência para o Desenvolvimento Turístico das Aldeias do Xisto* (Agency for Tourism Development in the Schist Villages) (Portugal)
CADW	Welsh Government's historic environment service
CCDR-C	*Coordination Commission for the Development of the Centre Region* (Portugal)
DG AGRI	Directorate General for Agriculture and Rural Development
DG ENTR	Directorate General for Enterprise and Industry
ERDF	European Regional Development Fund
ERIH	European Routes of Industrial Heritage
ETN	European Textile Network
FEDECRAIL	Federation of European Museum and Tourist Railways
GHG	Greenhouse gas emissions
HVPN	Historic Villages of Portugal Network (Portugal)
ICOMOS	Venice Charter for the Conservation and Restoration of Monuments and Sites
IPPAR	Portuguese Institute of Architectural Heritage
LEADER	Liaison Entre Actions de Développement de l'Économie Rurale
OECD	Organization of Economic Cooperation and Development
SVN	The Schist Villages Network Program (Portugal)
TALC	Tourism Area Life Cycle
TICCIH	The International Committee for the Conservation of the Industrial Heritage
TSG	Tourism Sustainability Group
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNTWO	United Nations World Tourism Organisation

LIST OF TABLES

LIST OF FIGURES

EXECUTIVE SUMMARY

Introduction

This study examines the development of and defines industrial heritage and rural tourism in Europe. It outlines the value of these tourism sectors in economic, environmental and socio-cultural terms. It presents a series of case studies of organizations, enterprises, communities and regions in a number of European countries that have had a range of experiences in these sectors. Discussing current issues and future possibilities, it suggests ways in which industrial heritage and rural tourism could be expanded, made more viable and sustainable, and deliver greater benefits for their local communities and for Europe's economy and its natural and cultural heritage as a whole. Both are forms of special interest tourism; both have grown rapidly since 1970 by responding to new markets, new lifestyles and new product development opportunities. Whilst the sectors are in some ways very different to each other, they have many issues in common.

Industrial Heritage Tourism

Although examples of industrial heritage tourism can be found across Europe it is concentrated in North-West Europe, the location of the early years of the Industrial Revolution. However, there is increasing activity in Southern, Central and Eastern Europe. Europe is very much the dominant player in industrial heritage tourism on a global basis. It is a European speciality, existing in both rural and urban areas. However, the sector is fragmented and largely composed of small attractions that rarely cooperate with each other. There are many different types of industrial heritage: some are more attractive to visitors than others.

Industrial heritage tourism is dominated by the public sector and 'not for profit' groups. It is often reliant on volunteers, many of whom are passionately involved with the conservation of industrial heritage. It does not replace the employment lost in former industries but it does bring notable direct and indirect income wherever it is successful, and can improve the image and reputation of former industrial areas. There are, however, often too few effective links to tourism agencies and other tourism businesses, despite the need for tourism income to support conservation. Tourism skills are often weak. Its success and sophistication varies considerably locally, regionally and nationally.

Rural Tourism

Rural Tourism is by comparison widespread across Europe, and is a very much larger activity in terms of turnover and employment. It is composed of a very large number of micro-businesses. Like industrial heritage tourism, it suffers from fragmentation, little cooperation or coordination and increasing competition internally and externally. Unlike industrial heritage tourism, it is essentially private sector, and primarily driven by economic goals and employment creation, often by developing part-time/pluriactivity jobs. It is important in terms of rural income and employment, typically providing between 10 and 20% of rural income and employment, twice tourism's income and employment levels averaged across Europe.

While industrial heritage tourism principally provides tourist attractions, rural tourism provides a complete tourism experience, offering both accommodation and attractions. Rural tourism creates place attachment, encouraging visitor loyalty and, therefore, repeat

visits. Rural tourism has a good record in product development and innovation, and in drawing in new capital and entrepreneurs from cities, other regions and countries, often driven by particular lifestyle choices. However, standards of service quality, marketing, product development and economic success vary considerably regionally and nationally.

Shared Issues, Common Goals and Impacts

Within both rural and industrial heritage tourism a number of membership groups have been established, at national and pan-European level, to assist with marketing and / or to act as lobbying organisations. Generally they have access to only limited funding, and their potential value is often not realised. Their tourism skills vary, and marketing, a traditional source of income, is now challenged by low cost internet based marketing sites. Both sectors are typically weak on market knowledge and on marketing techniques, although there are examples where specific enterprises and institutions perform very well indeed. Both rural and industrial heritage tourism are often situated in poorer regions, or in regions which are undergoing structural change. Neither is as well linked into regional development and restructuring actions as they could be.

Both rural tourism and industrial heritage tourism are important in terms of heritage conservation. Both help retain aspects of heritage landscapes – either directly though the conservation and re-use of buildings and structures for tourism use, or indirectly through valorising the work of conservation agencies in monetary terms, by bringing in visitor income. Both have job training and re-training impacts and have potential for expansion in this area. On a national scale they have great potential to become part of the new European growth in the creative industries, with their links to the arts, cultural activities and knowledge growth and dissemination. Both sectors offer benefits to local communities in which they operate.

There is no definitive value for industrial heritage tourism to the European Union economy. This study has estimated its economic impact based on fractions of existing tourism flows, showing an estimated 18 million overnight tourist trips plus 146 million day visits, generating a direct spend of almost €9 billion annually. The total impact is likely to be larger when the indirect and induced impacts are taken into account as many industrial heritage sites tend to be locally based with strong links to local communities increasing the local economic impact. EuroGites, the European rural tourism umbrella group, collected financial data from its member associations in 2008, and extrapolated that information to include known bed numbers from associations outside its membership. These calculations suggest that rural tourism supports 900,000 direct and indirect jobs in Europe, and generates €150 billion in gross income each year.

Conclusions

Rural tourism is essentially a private sector activity, driven by wealth and job creation, and often by farm diversification, which relies on landscape and related heritage conservation and infrastructure that is often paid for by the public sector. Industrial heritage tourism is primarily a non-profit or public sector conservation activity which relies in large part on tourism, along with public sector funding and volunteering, for its economic viability. Both have the capacity to expand, be better organized and use good practice more widely.

Both sectors have problems but have great potential to raise local and national prosperity, to help conserve Europe's industrial and rural heritage and to demonstrate how a pan European approach to solving problems and releasing potentials could be effective in creating world beating enterprises. Strengthening market knowledge, increasing skills,

improving governance, partnerships and networking, and creating innovative ways forward are all seen as keys to success, as is the development of more sustainable tourism including moving towards low carbon approaches.

Recommendations aim to tackle the problems noted in the study and provide information to guide future investment policies in industrial heritage and rural tourism, develop means to guide and increase the competeveness of the SMEs involved, provide effective governance systems to help partnerships and networking and create ways to develop the social, economic and environmental performance of the sectors involved. Seven specific recommendations are put forward:

- A virtual research and development centre, to analyse, assess and disseminate best practice;

- A prototype demonstration Industrial Heritage Region project;

- A prototype demonstration Second Generation Rural Tourism region;

- A demonstration project on Slow Tourism;

- A Heritage Hardware Training programme, developing repair and conservation skills for buildings and equipment;

- Innovative practice dissemination seminars;

- A niche product development and marketing initiative aimed at Asia and the BRIC countries.

The central recommendation is the establishment of a virtual research group based on an existing and successful applied science project across 18 European countries[1].

All recommendations are envisaged as relatively low cost and designed to be eventually self supporting. Several of the recommendations could help regenerate pan-European development and support groups, and some national groups.

There are a number of Annexes which contain additional case studies, supportive material and evidence. Annex H answers a range of frequently asked questions, including why these niche tourism areas are special to Europe, if there will be sufficient future market demand, if they are operating according to the principles of sustainable tourism, and if they take into account local people's views in the areas involved.

---

[1]   Austria, Belgium, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Italy, the Netherlands, Norway, Poland, Romania, Slovakia, Spain, Sweden, and the United Kingdom.

PREFACE

In the 1st initiative report within the Lisbon Treaty (report A7-0265/2011) *Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe*, tabled by Mr Carlo Fidanza, adopted on 27 September 2011 (P7-TA(2011)0407)) the European Parliament "emphasized that the development of Europe's industrial heritage could also benefit secondary destinations and contribute to achieving a more sustainable tourism sector in Europe, through the preservation, transformation and rehabilitation of the industrial sites"[2].

In the following point[3] the European Parliament underscored that "rural tourism and agri-tourism should improve the quality of life, bring economic and income-source diversity to rural areas, create jobs in these regions, keep people there - even by preventing depopulation - and establish a direct link with the promotion of traditional, ecological and natural food products".

This work's terms of reference states: "The choice of tourism focused on agricultural and industrial heritage as typical forms of thematic and diversified tourism seems to meet the objective of a sustainable tourism policy orientated both to preserve Europe's diversity and multiculturalism and to avoid the distortions and the damages of undifferentiated mass tourism."

The European Parliament's report was based on the communication from the EU Commission to the European Parliament[4] (COM (2010) 352 final) which stressed the value of tourism to the EU economy, with its 1.8 million tourism businesses, largely SMEs, providing 9.7 million jobs, many for young people and generating over 10% of EU GDP directly and indirectly. It defined the objective to retain the EU's position as the world's No.1 tourism destination and emphasized that "the EU now has powers in this field to support, coordinate and complement action by the Member States" (p.4).

The present study provides a background description and analysis of how, why, when and where industrial heritage based tourism and rural tourism have developed in Europe. It examines a series of case studies taken from a range of European countries and - where helpful – ideas from other nations worldwide. It draws from published research, consultancy reports, from the in total nearly 100 person years of personal experiences and research of members of the review team, and from a series of new enquiries undertaken especially for this study. It outlines current issues in these sectors, and suggests innovative and low cost ways forward to further the social, economic, environmental and cultural benefits that flow from the two sectors into local communities, wider regions, and across Europe.

The study is written as an information giving, educational and an ideas text, providing the background necessary to help develop future European Parliament Transport and Tourism committee discussions and policies in these areas.

---

[2]   Point 44 of the EP resolution P7_TA(2011)0407.
[3]   Point 45 of the EP resolution P7_TA(2011)0407.
[4]   The European Parliament were consulted on the communication before its adoption and opinions were received from a number of Parliamentary committees including IMCO, ITRE, REGI, AGRI and CULT.

This study faced a series of technical problems. Agri-tourism, rural tourism and industrial heritage tourism, although niche products, are extremely complex product areas, with very little effective networking between providers, and between providers and policy makers. Even defining each of the three areas is difficult and contested. In terms of statistical information, the majority of tourism statistics do not recognise agri-tourism, rural tourism or industrial heritage tourism as discrete areas. And objective, refereed research on the socio-economic benefits of the three topics is sparse, especially in industrial heritage tourism. The existence, the growth and the potential of all three topics is, however, not disputed.

1.   SPECIAL INTEREST TOURISM: AN INTRODUCTION

Agri-tourism, rural tourism and industrial heritage tourism are all niche market tourism areas, part of a global expansion of special interest tourism, defined and explained in Weiler and Hall's 1992 classic text on that subject. The three themes must be seen, and understood, as one of a series of fascinating developments in the post war evolution of tourism, summed up by the UN's World Tourism Organization (UNWTO) in 1985:

> "*New kinds of life-style and a new realization of the importance of relations between people and between people and nature are features of the 1980s. Gaining in importance are participation in outdoor activities, aesthetic judgement and improvement of self and society. The search for these new values in the exercise of tourism is reflected in organized recreation and the new products that have emerged, such as active holidays and special interest tourism*" (UNWTO, 1985, 3).

Ten years later official recognition of the growth and value of special interest consumer expenditures in general, and in tourism in particular, came from the Organization of Economic Cooperation and Development (OECD) in its work on the growth of niche markets and of niche market tourism, and the need for the private and public sector to understand and use their potential for socio-economic development (OECD, 1995; Clemenson & Lane, 1997). Earlier, the OECD had set guidelines for rural tourism (OECD, 1994a).

Special interest tourism continues to grow, spurred by the rapid expansion of the mass media into niche markets, by the internet's ability to inform, by new transport facilities, and by the surge in individualism and intellectual curiosity that society has seen.

1.1.   Tourism's Post War growth

To understand the background to special interest tourism in general and to rural tourism and industrial heritage tourism in particular, it is necessary to briefly outline the story of tourism's post war expansion, and its underlying drivers.

The standard global statistics come from the annual surveys of the UN World Tourism Organization. They show international tourism arrivals on a global basis rising from 25 million in 1950 to 982 million in 2011, worth €740 billion. Over that period there has been average year on year growth rates of 6%. UNWTO looks forward to 1.4 billion arrivals by 2020 (UNWTO, 2012a). Domestic tourism arrivals are, of course, very much greater, and much more difficult to quantify accurately. They may be up to eight times greater. In financial terms, not only is tourism a huge financial force; it is also a re-distributor of income within countries, typically from large cities and industrial regions to resort areas and increasingly to rural areas. It also redistributes income within the developed world, and from the developed world to the developing world. With that redistribution comes jobs and additional investment capital flows.

Europe is the largest receiving continent for international tourists, with 504 million arrivals out of the world's 982 million (45%), worth €333 billion. The Asia Pacific region is the second largest recipient of international visitors, with 28% of the world total (UNWTO, 2012b).

_____

Within the overall growth picture, however, there are a number of important internal stories. Tourism grew in the nineteenth century as a largely resort based industry, with a property development base. Existing resorts, which are typically sea and sand based resorts, along with some spa resorts, are now being challenged:

1. **By newer resorts -** often in other countries and/or continents, especially in Asia, Oceania, and Australia.

2. **By cruise ship tourism** - cruise passenger arrivals worldwide rose from 3.8 million in 1990 to 12.8 million in 2008; bed nights totalled 79.4 million worldwide in 2008 (CLIA, 2008). Numerous new cruise ships are under construction, and research results suggest that younger people are now beginning to cruise (Petrick, 2010).

3. **By city tourism** (also known as urban tourism) - until recently city tourism was restricted to the iconic heritage cities of the world: Paris, Rome, Sydney, and New York amongst many others. But increasingly city and regional planners are using tourism as a tool for the regeneration of dozens of medium size / large industrial cities world-wide, seeking to diversify their economies, change their image, and create jobs (Lagroup & Interarts, 2005). Beginning with the transformation of Baltimore's harbour district in the 1980s (de Jong, 1991), urban tourism has flourished, with a powerful mix of speciality retail, new hotels, cultural attractions, heritage developments from industrial to post-modern, and the ever growing activity of partying, eating and drinking. Rotterdam, Dublin, Bradford, Glasgow, Turin, Poznan, Riga and many more are all examples of the rise of urban/city tourism in Europe. High speed rail services and low cost flights are key drivers in this development. To emphasise the change, in 2010 the coal and steel based industrial cities of the German Ruhr region became Europe's Capital of Culture[5]. Many once purely industrial cities are now becoming a new type of self-contained, professionally managed, "authentic" heritage/culture based full service resort. They offer very serious competition for existing resorts, especially in the winter season. Two points of special importance for readers of this study emerge from this development:

   a. Industrial Heritage Tourism is a part, and could be a greater part, of this rise in City Tourism – although the "fit" is not always achieved or possible.
   b. It is difficult to obtain reliable overall statistics for city tourism in Europe – and for industrial heritage tourism.

4. **By rural tourism** - while existing in many parts of Alpine Europe for over a century, has grown rapidly, and in a unique way across most of Europe (and worldwide). It is unique because it is the first type of tourism that is not - as yet - resort based. EuroGites (2009a) claims that there are now 400,000 rural accommodation units in Europe, with 3.6 million bed spaces (twice the total bed capacity of Spain, the second most important tourism destination country in Europe). Growth figures can also be found for most other developed nations: it has become a world-wide phenomenon. Rural tourism – as will be explained later – is extremely broad in content, encompassing nature tourism, ecotourism, agri-tourism, adventure tourism, food tourism, and many other emergent developments. It is also an area of activity for which it is hard to obtain reliable statistics.

_____

[5]   See http://www.essen-fuer-das-ruhrgebiet.ruhr2010.de/en/home.html.

2. WHAT ARE THE KEY FEATURES IN THE RISE, DIVERSIFICATION AND TRANSFORMATION OF TOURISM?

This is a complex question. Tourism is essentially a fashion industry: people travel to where they believe it is fashionable to be, and they are largely guided in their beliefs by a powerful media industry. It is no longer very fashionable to spend time at many traditional European sea side resorts. It is increasingly fashionable to take short breaks in cities and in the countryside, often as second or third holidays. Holidays, once seen solely as time for relaxation, have diversified remarkably. The tourism analyst Stanley Plog (1974) noted the rapid growth of a new type of traveller, the allocentric, who focuses on activity and prefers unfamiliar, novel trips of many kinds. Education is also a growing motivation, in both formal and informal modes (Crompton, 1979).

It must be added, however, that tourism remains a leisure pursuit that, despite its links to education, must be enjoyable and uplifting. The emergence of the term "infotainment" – linking learning and enjoyment – is noteworthy. Holidays remain dream times, fulfilling dreams, enabling experiences.

In addition to the above, there are many powerful technical, economic and social factors to be noted, including:

- Rising car ownership;

- The spread of the high speed divided highway across Europe – including autobahnen, autoroutes, and motorways;

- Low cost airlines;

- Speciality tour operators – the UK's Association of Independent Tour Operators (www.aito.co.uk), for example, has over 140 specialist small tour operators;

- Rising levels of education;

- The introduction of credit cards, internet banking and the European common currency, making travel easier and less demanding;

- The internet, better fixed line and mobile telephony, and the ability to book holidays, transport and accommodation on line on a 24/7 basis;

- PLUS – until recently – the essential enabling factor - rising levels of disposable income;

- The rise of the pensioned and active older traveller, creating new markets.

Further complicating the picture, there have been a range of new paradigms and understandings in tourism which complete the background picture.

_____

2.1.   TALC – the Tourism Area Life Cycle

This concept, originating from Richard Butler in the 1980s, is a strong and valid influence on tourism planning. It explains that tourism destinations, like all consumer products, have a period of discovery, growth, maturity and then decline (unless regeneration measures are taken). Each destination brand needs to be refreshed after circa 25/30 years, sometimes earlier, if it is to avoid decline. The TALC concept helps explain the decline of many 1960s Spanish resorts, some resorts in Southern Italy and some North Sea resorts. It also sends a strong warning of potential problems to all destinations – conventional, rural, or industrial – that are not professionally managed, that do not invest in market research, and do not update their products (Butler, 2006).

2.2.   The recognition of the experience economy

For many years, tourism was sold as a commodity, to be purchased like any other tangible commodity. As both society and marketing moved forward, it was realised that tourism was *a service* as well as a tangible commodity. The service element was a major determining factor in consumer choice. This was especially the case as tourism moved into supply surplus, and competition grew between different parts of the industry, and different destinations. From circa 1990 the marketing literature moved on to see many businesses, including tourism, as selling *experiences* as well as services. A number of pioneering publications explained the emergence of "the experience economy". These include those by Gerhard Schulze (1992) and his book *Erlebnisgesellschaft*, later published in English as *The Experience Society (*1996); Rolf Jensen's book, *The Dream Society* (1999 and 2009) and Pine & Gilmore's *The Experience Economy* (1999). All of those writers noted that more and more people are able and willing to spend money on great/satisfying experiences, often emotional experiences, rather than conventional consumer goods.

The marketing techniques required to tap into the experience economy are both demanding and new. Tourism businesses have been slow to realise these important developments, which are especially important to the rural and the industrial heritage development sectors (Hjalager, 2002; Sundbo et al, 2007). Both are extremely experiential: they are not conventional passive leisure products. But uninformed marketing is a problem in both sectors.

To help understand the role of experience marketing in tourism, Visitor Experience Plans, were pioneered by the US National Park Service in the late 1990s. Although originally designed as a conservation tool, visitor experience planning and experiential marketing can help boost visitor numbers to destinations, especially when linked to market informed heritage interpretation plans (Hof & Lime, 1997; US National Park Service, 1997; Red Kite Environment, 2007). Visitor Experience Plans are rare in Europe.

2.3.   Place Attachment

One of the growth areas in understanding tourist preferences has been the concept of "place attachment studies" (Kyle et al, 2004; Ramkissoon, 2013). Place attachment relates to the psychological "hold" that places have on people, through the enjoyment or admiration of landscapes and townscapes, of their ambience, and through the

remembrance of experiences and relationships. Place attachment helps explain repeat visitation, and the way in which recommendation and word of mouth marketing works. Put briefly, both rural and urban destinations can develop strong place attachment; industrial heritage tourism, however, is weak on place attachment. A key reason for this appears to be poor site marketing in comparison to place/regional marketing, and the ability of regions with a full suite of visitor facilities (accommodation, hospitality and attractions) to develop much stronger place attachment than sites. It follows that industrial heritage tourism needs to address this problem.

2.4. Sustainable tourism

The relatively unregulated rise of mass tourism in the 1970s created widespread concern about its social, cultural and environmental impacts, especially in fragile natural environments. From that concern emerged the concept of creating more sustainable forms of tourism. Early criticism focussed on mass tourism. We now know that in many ways mass tourism is more easily managed than the spread of less intense forms of tourism – including rural tourism – but the stigma attached to mass tourism still exists. Sustainable tourism systems are related to the rise of the more general interest in sustainable development and the pioneering work of the Brundtland Commission (1987).

There are many definitions of sustainable tourism. The following is one of the many normally cited:

> "*Sustainable tourism is a positive approach intended to reduce the tensions and frictions created by the complex interactions between the tourism industry, visitors, the environment and the communities which are host to holidaymakers. It involves working for the long-term viability and quality of both natural and human resources. It is not anti-growth, but acknowledges that there are limits to growth*" (Bramwell & Lane, 1993)

The increasing interest in Corporate Social Responsibility in the travel and tourism industry is linked to the sustainable tourism concept. And, directly related to this study's findings, sustainable tourism researchers and practitioners normally link sustainable tourism to the use of rural tourism as a tool for the conservation of rural society, landscape and ecosystems. Equally there is a direct link from sustainable tourism thinking to the conservation of industrial heritage.

2.5. The Triple Bottom Line

Sustainable tourism employs the concept of triple bottom line accounting. This is the idea that as an indicator of sustainable tourism, enterprises, communities, regions and nations should record not just economic results – plus or minus – but also environmental, social and cultural results – plus or minus (Elkington, 1997). Triple Bottom Line accounting is now a required feature of tourism strategy making and plans.

2.6.   Ecotourism

The term Ecotourism is much used in the USA as an alternative for sustainable tourism, and also for rural tourism. Many commentators in the USA fear the political overtones of the word "sustainable". Strictly, and across the rest of the world, Ecotourism is defined by Ceballos-Lascurain (1996) as:

> "*Environmentally responsible travel and visitation to relatively undisturbed natural areas, in order to enjoy and appreciate nature (and any accompanying cultural features – both past and present), that promotes conservation, has low visitor impact, and provides for beneficially active socio-economic involvement of local populations*."

That definition is used by the International Ecotourism Society, who recognise it as a specialist sub-set of the wider concept of Sustainable Tourism, and applicable to rural areas. The word ecotourism is of value, but rarely used, within Europe.

2.7.   Tourism as a Regeneration Tool

Many writers on sustainable tourism recognise that tourism should not be an end in itself, but should also be a conservation and regeneration tool for urban and rural areas. This study illustrates a range of cases where tourism has been used as a regeneration tool. It is important to note, however, that tourism cannot always succeed in that task if (a) the site and its situation is not good for tourism purposes (b) the stakeholders involved in the project are unwilling to work together, or have weak entrepreneurial and related tourism skills and (c) if the funding is insufficient or the time scale is too short.

2.8.   Slow Tourism

The concept of slow food emerged in Italy in 1986 as a protest against the industrialisation of food, against "big business" in the food industry and in favour of traditional foods and cooking, traditional agriculture and small scale, local production (Andrews, 2008). It has grown, and it has been joined by a range of other "Slow" movements, including Slow Tourism. Both slow food and slow tourism have links to rural and agri-tourism; food related tourism is also a fast growing sector.

Slow tourism can be defined as:

> "An emerging conceptual framework which offers an alternative to air and car travel, where people travel to destinations more slowly overland, stay longer and travel less." (Dickinson, Robbins & Lumsdon, 2010)

Slow tourism stresses the importance of the travel experience, the enjoyment and understanding of destinations, cultures and landscapes, slow food and drink, and it has a very strong link to the issues of climate change outlined below (Dickinson & Lumsdon, 2010). It is an important element in future thinking on rural tourism, and links to a number of transport elements in industrial heritage tourism, especially to canal and heritage rail

modes. Tangible examples are, as yet, hard to find, but the tour operator Inntravel[6] has a fast growing business based on Slow Travel; there are discussions in Austria about developing the 107 km Stainach Irdning to Attnang-Pucheim rail route as a slow tourism corridor.

2.9.   Climate Change

Climate Change issues are an increasing problem for the tourism industries of the world. Although tourism is regularly cited as contributing just 5% of the world's total Green House Gas (GHG) emissions, that figure is a minimal one: many researchers find the full contribution of tourism to GHG is between 5.2% and 12.5% (Scott et al, 2010). The real fear is, however, about the future. Because of tourism's high growth rates, the rising use of air travel, and the rise in long-haul travel, tourism related GHG emissions could rise by 130% by 2035 from 2005 figures. Given rising sea levels and changes in climate that effect food production, tourism could face strong pressures to change its approaches, and tourists could face equally strong pressure – financial and social – to change their travel and tourism behaviours and habits. While there is evidence that travel is addictive (Cohen, Higham & Cavaliere, 2011), many addictions can be broken.

Climate change presents both threats and opportunities for rural tourism and, to a lesser extent, for industrial heritage tourism. Some aspects of rural tourism may be threatened by climate change: landscapes may change and become less attractive in parts of southern Europe and wildlife resources may be lost. The latter is already an issue for whale watching in northern Europe (Lambert et al, 2010). A specialised branch of rural tourism, winter sports tourism, is also concerned about climate change. Key areas include winter tourism areas in relatively low lying parts of Germany and Sweden (Soboll & Dingledey, 2012; Brouder & Lundmark, 2011). Rising sea levels could be a problem for some industrial heritage sites, and for many coastal cities.

A further negative influence on rural tourism could come from rising fuel prices, (caused by taxation and/or world scarcity) impacting on both car and air travel to rural destinations. The car is currently a vital element in the rural tourism market strategy. But there are also positive aspects to climate change and its influences. Slow tourism appears to have some romantic appeal, and already rural walking and cycling are strong "slow" markets. Increasing prices for long haul tourism may encourage more domestic, intra Europe, holidays. Industrial heritage tourism could benefit from "staycations". Heritage rail travel could become more attractive. Behavioural change is a key way to tackle climate change: short-haul rural holidays with little car use while in the rural area could be a valuable anti-climate change approach. Austria's rural resort of Werfenwang has long experience of such approaches[7].

For an up-to-date detailed but accessible report on Climate Change see World Bank (2012); for a review of tourism adaptation to climate change see Scott and Becken (2010).

In addition to the points raised and explained above, Annex H gives a list of frequently asked questions about tourism and special interest tourism.

---

[6]   www.inntravel.co.uk.
[7]   www.werfenwang.at

3.   INDUSTRIAL HERITAGE TOURISM AND RURAL TOURISM: AN OVERVIEW

In summary, rural tourism is essentially a tourism activity which relies on landscape and related heritage, the conservation of which is usually paid for by the public sector. Industrial heritage is primarily a conservation activity which relies in large part on tourism, along with public sector and volunteer funding. Both have the capacity to expand, be much better organized and to spread good practice more widely and deeply. Both have a small number of world beating enterprises, and very large numbers of much less effective enterprises. Both have many organizational and technical problems which could benefit from strong pan-European networking organizations to carry out basic research and advisory/lobbying roles. They have some common origins and some issues in common – but in other respects they can be very different from each other. A detailed list of common and contrasting features can be found is Table 2 at the end of this section.

3.1.   What is Industrial Heritage Tourism?

It is tourism that visits industrial heritage sites, or museums with a special interest in industrial heritage. It is important to note that industrial tourism, or factory visits, are not seen as being industrial heritage tourism: normally heritage sites are not in production, except for demonstration or small scale production purposes.

There is little discussion of definitions of industrial heritage tourism in the academic literature, nor is there very much refereed tourism research on the subject (see, however, Edwards & Llurdés i Coit, 1996; Cole, 2004). This is an area which falls between study areas – it does not fit easily with tourism research, or with heritage researchers, or with regional studies.

In 2001, Michael Falser, an Austrian architect and art historian working at UNESCO, produced a global analysis of industrial heritage sites entitled *Is Industrial Heritage under represented on the World Heritage List[8]*. His definition is lengthy and a little vague, but he suggests a 10 point classification of industrial heritage:

1.   Extractive Industries (e.g. coal, ore- or gold-mining)
2.   Bulk Products Industries (e.g. primary metal industries)
3.   Manufacturing Industries (e.g. machine textile manufacture)
4.   Utilities (e.g. water supply, electricity)
5.   Power Sources and Prime Movers (e.g. water wheels, steam turbines)
6.   Transportation (e.g. railroads, canals, harbours)
7.   Communication (e.g. radio, telephone)
8.   Bridges, Trestles, Aqueducts
9.   Building Technology (e.g. roof systems, fenestration)
10.   Specialized Structures/Objects (e.g. dams, tunnels, hydraulic works)

---

[8]   Available at http://whc.unesco.org/archive/ind-study01.pdf.

Of those ten, categories 1, 2, 3, 5, 6, 8 and 10 are the categories most developed as industrial heritage tourism sites. Of those seven, categories 1, 2, 3, and 6 – (mines, metal working sites, factories and transportation systems) appear to be the most visited.

There are three additional categories not listed above which are also very important. There are a number of industrial heritage complexes comprising factory or factories complete with workers housing and related buildings and infrastructure. Examples include Saltaire in England, New Lanark in Scotland, and La Chaux de Fonds/Le Locle in Switzerland: all are World Heritage Sites. The second additional category comprises the many industrial museums, such as the Catalonian Museum of Science and Industry in Spain, the Chemnitz Industrial Museum in Germany and the Museum of Technology at Hengelo, the Netherlands. And finally there is the very special category of industrial museums that attempt to replicate industrial heritage complexes, rather than be conventional museums. The largest example of this type in the world is the UK's Beamish – The Living Museum of the North[9]. Beamish is an open air museum in the North-East of England which in its 120 hectares presents a working re-creation of everyday life at the early twentieth century climax of the industrial revolution, complete with working tramways, an accessible coal drift mine, costumed interpreters, period retail shops, etc. It raises very special issues of management and design, and is the subject of a case study in this study.

It should be noted that the categories discussed above fit reasonably well with those adopted by the European Routes of Industrial Heritage group – see section 5 of this study.

In 2003, the TICCIH, (The International Committee for the Conservation of the Industrial Heritage) set out the Nizhny Tagil Charter for the Industrial Heritage[10]. It is the industrial heritage equivalent of the well-known ICOMOS 'Venice Charter for the Conservation and Restoration of Monuments and Sites', dating from 1964. The Nizhny Tagil Charter defines industrial heritage, sets out guidelines for its conservation and use, but has no reference to tourism except to say that "public authorities should promote tourism to industrial areas". There is no definition of industrial heritage tourism.

Typically, industrial heritage tourism is largely site, building, machine and technology based. It is rarely regional, although there are some very important exceptions to that rule, notably in Germany's Ruhr region. And industrial heritage tourism tends to be relatively weak on the social and cultural heritage of the industrial revolution. Jones and Munday (2001: 586) call for industrial heritage tourism to not only cover physical remains from the industrial past, but also sociofacts – "aspects of social and institutional organization", along with mentefacts – "attitudinal characteristics and value systems including religion and language". This issue will be covered later.

The majority of industrial heritage sites inevitably date from the eighteenth and nineteenth centuries, the era of the industrial revolution, and, using the UNESCO list of 962 industrial heritage sites as a guide, Europe has a near monopoly of this activity. Of the 33 listed industrial heritage related sites, 28 are in Europe (Table 1).

The UNESCO list of industrial heritage sites in Europe provides a shorthand guide to the most common types, their nature and their distribution:

---

[9]   www.beamish.org.uk.
[10]   See www.ticcih.org.

Table 1:   European Industrial heritage sites in the UNESCO WHS list

Country	Site
Austria	The Semmering Railway from Vienna to Graz
Belgium	The 4 Lifts on the Canal du Centre
Belgium	The Major Mining Centres of Wallonia
Finland	Verla Board Mill in southern Finland
France	Royal Salt Works at Arc-et-Senens in eastern France
France	Nord-Pas du Calais Mining Basin
France	Canal du Midi in South Eastern France
Germany	Mines of the Upper Harz Mountains
Germany	Völklingen Iron Works, Saarland
Germany	Zollverein Coal Mine, Essen
Germany	The Fagus Factory, Alfeld. Lower Saxony
Italy	The Rhaetian Railway (also in Switzerland)
Netherlands	Mill Network at Kinderdjijk-Elshout, Rotterdam
Netherlands	D.F. Wouda Steam Pumping Station, Friesland
Norway	The Mining Town of Røros, east of Trondheim
Poland	Wieliczka Salt Mine, Krakow
Spain	Vizcaya Bridge, Bilbao
Sweden	Engelsberg Ironworks, west of Stockholm
Sweden	Mining area of the Great Copper Mountain, Falun
Sweden	Grimeton Radio Station, southern Sweden
Switzerland	Rhaetian Railway (also in Italy)
Switzerland	La Chaud de Fonds / Le Locle Watchmaking Towns
United Kingdom	Ironbridge Gorge, Shropshire
United Kingdom	Blaenavon Industrial Landscape, South Wales
United Kingdom	Derwent Valley Mill, Derbyshire
United Kingdom	New Lanark, southern Scotland
United Kingdom	Saltaire, Yorkshire
United Kingdom	Pontcysyllte Aqueduct & Llangollen Canal, north Wales

Most sites are, not surprisingly, in northern Europe, the heartland of the early industrial revolution. Large parts of Eastern Europe industrialised only in the twentieth century; many parts of southern Europe did not industrialise. Within northern Europe, Germany and the UK, the leaders in nineteenth century industrialization, each have far more industrial heritage than any other country, and have led the way in many aspects of industrial heritage conservation and tourism development.

Four other key issues in industrial heritage tourism need to be highlighted.

It is typically a site only phenomenon. It rarely includes accommodation elements, unlike rural tourism. That is important: up to 50% of the gross income from tourism into an area comes from overnight accommodation. The ability to offer overnight accommodation also increases the likelihood of local food and beverage sales, which can account for up to 30% of tourism income (WTO, 1998). Many former industrial areas do not have existing accommodation facilities, nor do they often have many domestic properties large enough to offer bed and breakfast facilities: both omissions are linked to their industrial pasts. Again, unlike rural tourism, few industrial regions have as yet evolved into even proto-resorts, capable of offering a range of attractions and accommodation, and offering a brand image. Because of the failure of many industrial heritage sites/museums to link with tourism interests and agencies, it is hard to progress the evolution of industrial heritage into full destination status. Industrial sites find it hard – but not impossible – to develop place attachment. Ways forward on these key questions will be given later, especially in the discussion of the Beamish Museum in the UK and the Ruhr area of Germany in Sections 5.1.4 and 5.1.5.

Secondly, the drivers behind the conservation of industrial heritage are usually quite different to those driving rural tourism. As Table Two shows, most industrial heritage site management is undertaken by non-profit, local government or state agencies, and often by volunteers rather than paid labour. Funds come largely from the public sector. The aim is normally to conserve, not to make money. Chhabra (2009) provides an interesting commentary on this, albeit from a USA perspective. Tourism is sometimes seen by those managing heritage sites as somehow outside their remit. There is often a lack of partnership between tourism agencies and heritage sites (Datzer, Seidel & Baum, 2010).

Thirdly, industrial heritage tourism labours under serious psychological and aesthetic burdens. The link between industry, hard work and the often tough living conditions of the past is deeply engrained in the psyche of much of the population. Both Cole (2004) and Jansen Verbeke (1999) note the desire of many to tear down monuments and relics of the industrial past, let alone visit them. An appreciation of the industrial landscape is a taste that can be hard to acquire for some. While most will enjoy the sight and sound of a steam train climbing a steep hill, with sparks, black smoke and steam shooting skywards, not so many appreciate derelict industrial sites and the remains of industrial waste. It is not surprising that railway heritage tourism is popular: it is an easily absorbed visitor experience.

Finally, it is a popular belief that health and safety issues, and trends in society towards litigation, are becoming problematic, especially for industrial heritage. As part of the research for this study, the authors wrote to all the national rural tourism organizations linked to EuroGites, and to all the national heritage railway organizations linked to Fedecrail (see 5.4) to ask about legal and other constraints on their activities and those of their members. They reported very few problems with health and safety rules, or with tourists taking legal action. Most did not feel this to be a problem because most health and safety

legislation applies to all businesses, not just tourism. Most had insurance against legal disputes. The impact of safety standards were largely seen as acceptable in the twenty-first century and lobbying against unacceptable demands appears to have been successful. The problems of obtaining market share, finding public and private funding, appointing quality staff and trading profitability were seen as much more pressing.

3.2.   What is Rural Tourism, and what is Agri-Tourism?

Rural tourism is tourism which takes place in the countryside. Agri-tourism is rural tourism that takes place on farms. However, such a simple definition of rural tourism is inadequate for many purposes (Keller, 1990; Greffe, 1992). Problems include:

1. Urban or resort based tourism is not confined to urban areas, but spills out, through excursions, employment and purchases, into rural areas.

2. Rural areas are themselves difficult to define, and the criteria used by different nations vary considerably.

3. Not all tourism which takes place in rural areas is strictly "rural" - it can be "urban" in form, and merely be located in a rural area. Many so called holiday villages are of this type: in recent years numerous large holiday complexes have been completed in the countryside. Their degree of "real" rurality can be both an emotive and a technical question. They may be urban in layout and architectural style and scale. They may be urban in ownership and management. They may be urban (or not local) in purchasing policies for food and drink. And they can be completely self-contained in terms of function - visitors may never, or only rarely, leave the complex and enter the "real" rural world. (See Murdoch, 1993; CPRE, 1994;[11];[12]).

Getz and Page in their review of *The Business of Rural Tourism* (1997) conclude that a definition of rural tourism is valuable for public sector policy makers and planners. They need to define the subject to determine eligibility for grants and other incentives, and equally, to have definitions which ensure that permission for development goes to rural initiatives which can help conserve the countryside, rather than urbanise it. But Getz and Page are less sure of the value of defining rural tourism for others: "the question of what is rural is irrelevant to rural tourism business operators ... (and) *not really of importance to visitors either*" (Getz & Page, 1997, p.192). This is an uninformed view. Businesses need to consider very carefully how they pitch their enterprises, to take maximum advantage of the marketing opportunities afforded by rural images. They also need to understand how to understand "perceived rurality" so that their activities do not damage the reality or image of the countryside. And rurality is an essential requirement for many visitors: tourism is ultimately a form of escapism from everyday urban and suburban life: understanding how the market defines rural is, therefore, vital. There is also a broad environmental and ethical goal in seeking a definition. The search for a definition of rural tourism brings with it a search for the value judgements which should underlie the rural tourism development and management process.

---

[11]   http://www.centerparcs.com/.
[12]   www.landal.com.

The OECD's Rural Development Programme tackled the definitional issue in the early 1990s. They concluded that rural tourism, in its 'purest' form, should be:

1. Located in rural areas

2. Functionally rural - built upon the rural world's special features of small-scale enterprise, open space, contact with nature and the natural world, heritage, 'traditional' societies and 'traditional' practices.

3. Rural in scale - both in terms of buildings and settlements - and, therefore, usually – but not always - small-scale.

4. Traditional in character, growing slowly and organically, and connected with local families. It will often be controlled locally and developed for the long-term good of the area.

5. Of many different kinds, representing the complex pattern of rural environment, economy, history and location.

(OECD, 1994a).

Table 7, in Annex A, shows in detail how rural tourism differs from urban resort tourism. Rural tourism also provides a quite distinct series of types of holiday - see Table 8 in Annex B.

The OECD's Rural Development Programme applied to that definition above their threefold geographical criteria, noting differences between tourism according to location:

1. Peripheral or remote regions, characterised by sparse populations, small-scale often traditional enterprises, high servicing costs and economic poverty.

2. Intermediate' regions, which make up the majority of the rural land mass, and lie midway between the extremes of peripheral regions and economically integrated rural regions.

3. Economically integrated regions, often close to large urban complexes, tend to have large farm units, a diversified economy, good services and relative affluence.

(OECD, 1992).

As pointed out earlier, in contrast to Industrial Heritage Tourism, Rural Tourism is normally a "complete", albeit unplanned, package of tourism facilities, comprising a range of accommodation facilities, a range of hospitality facilities, attractions both natural and man-made, retailing, and often co-ordinated information facilities provided by a local partnership, a local council or community. Almost all accommodation facilities will be privately owned, along with many of the attractions. Because of this, rural tourism can be, and often must be, more attentive to market demands. Equally, however, rural tourism benefits enormously from the work of the romantic poets, painters and composers of the past who have endowed us with an appreciation of nature, rural landscapes and open air recreation. Rural tourism owes much to Beethoven's 6th Symphony, William Wordsworth's nature poems, and the paintings of Germany's Caspar David Friedrich and Spain's Carlos de Haes.

3.3.   The decline of the term Agri-Tourism?

Traditionally, agriculture was central to rural life. It was the main employer of labour, the main source of income within most rural economies, and indirectly the farming process and community had a powerful influence on traditions, power structures and life styles. Decisions made by farmers determined land use and landscapes.

Early forms of rural tourism were, not surprisingly, strongly linked to accommodation on farms. That linkage grew as farm diversification began to be officially encouraged in the 1960s and 70s. The use of the term agri-tourism became common, and some of the agricultural ministries of Europe supported agri-tourism development. But gradually, the term rural tourism has taken over, with agri-tourism becoming just one sub-sector of a more holistic rural tourism.

There are a number of reasons for this. As tourism developed in rural areas, it became clear that visitors might stay overnight in farms, but much of their time was spent away from farms, exploring the countryside in general, and villages and country towns in particular. And the central role of farming in the countryside continues to diminish. By the early 1990s only five OECD countries[13] employed more than 15% of their labour force in farming, forestry and fishing: in eight OECD countries that figure was less than 5%. Even the role of agriculturists as guardians of the traditional landscape has declined: farmers must now often ask planners and conservation agencies for advice and finance to carry out their landscape and nature conservation work. And many smaller farms are opting out of agriculture, and becoming full time tourism enterprises. The large farms that remain tend not to need tourism income. Meanwhile, there has been a surge in accommodation and attraction development in villages and small country towns. And, as G4 in Annex G describes, a new type of rural tourism entrepreneur is moving in to rural areas – the life style entrepreneur – who moves in from the cities, develops a small life style rural tourism business, and lives there.

For all those reasons, it is normal nowadays to refer to rural tourism, of which agri-tourism is a part, rather than just to agri-tourism.

3.4.   What were the origins of Industrial Heritage Tourism and Rural Tourism?

The growth of both activities can be traced back to the late 1960s and early 70s and are products of economic and technical changes, which threatened the status quo of society, life styles and long existing economies.

Agricultural change threatened traditional farming patterns and techniques in much of the developed world. In 1968, Sicco Mansholt, then European Commissioner for Agriculture, suggested that small farms had no agricultural future. The Mansholt Plan envisaged five million farmers giving up farming (European Commission, 1968). Mansholt also noted that heavy industries – coal, iron and steel, textiles, and shipbuilding - were shedding enterprises and labour rapidly. These development trends helped create both industrial heritage tourism and rural tourism. Farms diversified to maintain their income: tourism was

---

[13]   Greece, Iceland, the Republic of Ireland, Portugal and Turkey (OECD,1994b).

a way out of dependence on agriculture. It also helped to valorise and conserve rural areas themselves, their lifestyles and cultures. Industrial areas saw the creation of industrial heritage based on redundant heavy industrial plants and infrastructure. Tourism helped valorise and conserve aspects of vanishing heritage, lifestyles and cultures.

Conservation emerged as a key word. It is timely to recall Robert Shannon Peckham's words from 2003: "The prospect of loss haunts heritage"[14]. That prospect became a powerful driver for the heritage industries and for heritage based tourism. Nostalgia – for lost industrial and agricultural worlds - became a powerful force for conservationists and heritage tourism. That fear of loss is still important in tourism terms. It is partly behind the rise in food tourism. It manifests itself in political ways too. José Bové and François Dufour's book "Le monde n'est pas une merchandise" (2000) (The World is not for Sale) is simultaneously a manifesto for sustainable farming on traditional lines, a political document, and a romantic marketing presentation for rural tourism.

Both industrial heritage tourism and rural tourism have a purpose beyond simple economics. Both can act as a guardian of the physical record of the past, and as a justification for the conservation of that past. In 1990, Peter Keller, reporting to the Tourism Committee of the OECD, on '*Tourism Policy and Rural Development*'[15], wrote 'The countryside as a creative counterbalance to the hyper-civilised urban centre is no illusion ... hill farmers must be kept on the land ... highly developed economies should be able to afford the luxury of safeguarding typically rural areas'[16]. Peter Keller was not a rural sociologist or a representative of the farming community: for over 30 years he was responsible for tourism policy at Switzerland's Federal administration.

In more detail, the growth of both industrial heritage tourism market and the rural tourism market reflects increased levels of public education and the interest and endorsement of both activities by the mass media. Both have also benefited from changes in the school curricula in many countries which now require knowledge of the recent past, of geography and environmental issues, and for many, some knowledge of the countryside.

The rural tourism market has two additional features. Most surveys reveal that both "peace and quiet" and access to nature are key attractions. Secondly, exercise – largely walking, but increasingly leisure cycling, and to some extent more extreme activity sports such as climbing, orienteering and similar pastimes, have become very popular. Much depends, however, on the legality of countryside access in specific nations. Britain, Germany, Austria, Switzerland and France for example have dense networks of footpaths and other routes, typically well mapped and signed, with relatively clear legal rights of access.

Table 2 below summarizes the key features of Rural and Industrial Heritage Tourism.

---

[14] Shannon Peckham, R. (ed). Rethinking Heritage: Cultures and Politics in Europe. New York: I. B. Tauris. 2003, p.3.
[15] OECD (1990) Tourism policy and sustainable development of rural areas, OECD, Paris.
[16] OECD (1990) Tourism policy and sustainable development of rural areas, OECD, Paris.

Table 2:   Key Contrasting Features of Rural and Industrial Heritage Tourism

	Rural Tourism	Industrial Heritage Tourism
Distribution	Widespread	Limited to former industrial areas
Scale of individual assets	Small	Small to large
Ownership	Mainly private	Largely Non-profits and Public sector
Number of sites	Very numerous: a fragmented activity	Small – but a fragmented activity
Marketing	Site specific and through partnership schemes	Usually site specific
Market	General and niche	General and niche
Attractions	Yes	Yes
Accommodation	Yes	No
Conservation Role	Indirectly	Directly
New business creation	Yes	Rare
New product development	Often	Potentially
Direct employment	Large	Small
Indirect employment	Large	Medium
Volunteering	Rare	Very Important
Pluriactivity	Common	Rare
Local development groups	In some cases	No
National development groups	Usually	In some cases
European groups	Yes	Yes
New concepts	Yes	In some cases
Legal constraints	Health / Safety	Health / Safety
	Planning	Planning

4. THE BENEFITS OF INDUSTRIAL HERITAGE AND RURAL TOURISM: AN ECONOMIC, ENVIRONMENTAL AND SOCIO-CULTURAL ANALYSIS

Both Industrial heritage tourism and rural tourism claim to offer benefits to the economy, to heritage protection, to local communities where they operate and to the wider society. While there is little evidence that this is not true, except in very specific circumstances, there is equally not a lot of evidence about exactly how effective their activities are in creating overall benefits.

The lack of evidence stems from:

- Poor, conflicting and numerous definitions of industrial heritage, of rural areas, of tourism (as compared to recreation), of tourism in general, of heritage tourism, and of rural tourism.
- Lack of statistical data and serious problems in collecting such data.
- Lack of funding for detailed single site, and especially for regional, research.
- The nature of tourism and visitation. A very large number of tourists take part in more than one form of tourism on any given trip, and often on any given day. A family might visit a cathedral in the morning, enjoy culinary tourism in a small city at lunchtime, ride a heritage tourism railway in the afternoon, include a visit to a nineteenth century woollen mill as part of that ride, and then spend the night in a farm. Even within that family, there will be very different interests and demands – as shown in the classic study of rural tourism by Palacio and McCool (1997).

Despite the above, this section describes, assesses and discusses the existing and potential benefits of industrial heritage and rural tourism, according to their economic, environmental and socio-cultural impacts.

4.1. The Economic Impact of European Industrial Heritage

Like many other tourism attraction sites of all kinds, industrial heritage sites generate income from visitors. Their primary income comes from entrance fees. But there are also numerous secondary incomes. The majority of site visitors are usually making day visits from their home: secondary, indirect income comes from food, beverage and retail spending, plus travel expenditure in the regions they visit. But, in many cases, by attracting day visits they add to the tourism 'offer' of an area and attract overnight visitors. These overnight visitors generate further secondary income for local areas in the accommodation and food and drink sectors; this is normally several times greater than their spending at the site alone and much greater than spending by a day visitor.

In addition, the direct spending by tourists at industrial heritage sites stimulates further spending by these organisations and their employees in the local economies. This *indirect* and *induced* spending can increase the total economic impact of tourism significantly. For example, a study of the West Somerset Railway, a heritage steam railway in south west England, estimated the value of the *multiplier* at 1.9 (International Centre for Research and Consultancy, 2004). For every one Euro spent with the railway a further 0.9 Euros is generated in the local economy, almost doubling the value of the initial spending.

These conclusions were verified by a study of the impacts of the Ffestiniog and Welsh Highland Railways, in North Wales (Williams, 2008). Both railways are purely heritage tourism lines, with a combined length of 60 kilometres: the Welsh Highland railway has been recently rebuilt and reopened, 70 years after its closure as a conventional line. The primary income from the 128,000 passengers, 95% of whom are tourists, is circa €6 million; secondary indirect and induced income injects an estimated €5 million more into the local economy. An estimated 12,000 of its passengers visit the area primarily because of the heritage railway. The peak gross income of the railway is forecast to be €14 million as the brand image and marketing work of the lines grows. The average firm in the rural area surrounding the railway employs 6.6 people: the railway employs the full-time equivalent of 60 people.

There is currently no single or comprehensive source of data on the impacts of the industrial heritage sector. The sector is highly diverse, in terms of size, governance and the industry involved. Some sites are small, preserving just one piece of heritage and rely wholly on unpaid volunteer support; others are much larger with a greater business ethos often combining a professional management and workforce with voluntary labour. Whilst some have grouped together to form national or international umbrella organisations others remain 'undiscovered', and membership of the national or international organisations is by no means comprehensive.

Given the diverse nature of industrial heritage and that many sites are small and unrecorded, there is no or limited data on the demand for and spending within the sector. There is also an overlap with other similar activities such as cultural heritage, archaeology, science and technology, built heritage, and museums. However, there are some studies that give an indication of the potential economic impact of industrial heritage sites and the associated tourism impact. A report by the Heritage Lottery Fund and VisitBritain (2010) *Heritage and the UK tourism economy* estimated that the total heritage sector is worth over €24 billion to the UK economy, supporting over 250,000 full-time-equivalent jobs (Table 3 below). Although industrial heritage tourism is a small part of the overall heritage industry, it is likely to result in direct and indirect income of around €2.5 billion using the formula discussed later.

Table 3:   The UK heritage based visitor economy

Annual Expenditure	
International tourism	€3.1bn
Domestic overnight stays	€0.6bn
Domestic day trips	€5.0bn
Total expenditure	€8.7bn
Total expenditure incl. multiplier impacts	€24.3bn
Employment	
Employment (jobs)	113,000
Employment (jobs) incl. multiplier impacts	270,000

Source: Adapted from *Heritage and the UK tourism economy (2010).*

In 2010 a detailed study of the potential of industrial heritage tourism in the Brandenburg Region in Germany (Datzer, Seidel & Baum, 2010) estimated its value to the region at €50 million annually. They also note the difficulty in estimating the level of employment created, partly due to the use of volunteers to undertake many tasks, but estimate the number to be below 500, (see section 5.1.5).

The world's largest railway museum, the UK National Railway Museum in York, attracts over 770,000 visitors annually (NMSI, 2011). A recent study by the Yorkshire Tourist Board (2008) estimated that the museum brought almost €29 million expenditure within the county (Yorkshire). Over half of this was from domestic and international overnight stays.

There are a number of approaches to estimating the demand for and the economic impact of industrial heritage tourism across the European Union. In general these fall into two categories, bottom-up or top-down. A bottom-up approach requires extensive data collection, normally on a site-by-site basis. Even if such data were available these normally include site admission charges and spending at sites but are less likely to include spending on accommodation, retail, transport, and food and drink away from the site.

A top-down approach relies on general tourism data which includes 'off-site' spending, but assumes that the characteristics are similar to the average tourist, which may or may not be the case. There is a lack of consistent European data in this area; therefore, a 'top-down' methodology has been adopted. This involves taking general data on tourism in Europe and refining this based on a series of assumptions. Through a progression of steps this enables an estimate of demand and economic impact to be estimated.

Annex F shows the proportion of respondents that gave *Culture/Religion* as their main reason for going on holiday in a recent survey (TNS Political & Social, 2012). The Culture/Religion category[17] was judged to be the most likely to contain the industrial heritage motivation amongst the possible responses to the survey. It is accepted that this category will contain a number of other motivations and that the other categories may have also an element of industrial heritage within them. It must also be noted that the respondents were only allowed one choice (rather than multiple responses). We know that many tourists have multiple reasons for visiting an area, and often visit multiple types of attractions. Both these factors are likely to cause some underestimate of the demand for industrial heritage tourism.

To allow for the breadth of the Culture/Religion category the figures in Annex F were adjusted before being applied to the overall demand figures for overnight tourism and day visits. The estimates for each country are shown in Table 4; overall it is estimated that industrial heritage tourism generates over 18 million tourist trips and 146 million day visits.

---

[17]   The other categories were: Recreation, Spending time with your family, Sun/beach, Visiting friends and relatives, Nature, City trips, and Sports-related.

Table 4:   Industrial heritage tourism demand

Country	Overnight Tourists (million)	Day Visits (million)
Austria	1.21	4.81
Belgium	0.60	7.10
Bulgaria	0.02	0.11
Cyprus	0.01	0.04
Czech Republic	0.29	1.68
Denmark	0.11	0.23
Estonia	0.05	0.12
Finland	0.19	0.22
France	2.14	15.73
Germany	5.95	65.85
Greece	0.08	0.30
Hungary	0.07	1.76
Ireland	0.04	0.66
Italy	1.67	14.22
Latvia	0.02	0.11
Lithuania	0.02	0.17
Luxembourg	0.03	0.24
Malta	0.02	0.05
Netherlands	1.01	8.06
Poland	0.24	1.36
Portugal	0.22	2.32
Romania	0.04	0.38
Slovakia	0.04	0.07
Slovenia	0.02	0.02
Spain	2.63	6.18
Sweden	0.46	0.41
United Kingdom	1.09	14.18
Total	18.28	146.36

As discussed above one of the benefits of using a top-down approach is that the wider impacts of the tourism activity can be captured rather than just the direct spending at the site. For this study average spending figures from Demunter & Dimitrakopoulou (2012) have been used; €349 for international tourists, €220 for domestic tourists and €28 for day visits. It is estimated that demand motivated by industrial heritage generates €4.8bn from overnight tourism and €4.1bn from day visits for local economies (see Table 5 below).

Table 5:   Estimated spending by industrial heritage tourists

Country	Overnight Tourists (€ million)	Day Visits (€ million)
Austria	366.7	134.5
Belgium	174.4	198.7
Bulgaria	7.0	3.0
Cyprus	4.8	1.2
Czech Republic	83.3	47.2
Denmark	29.4	6.3
Estonia	15.0	3.3
Finland	48.6	6.1
France	550.8	440.6
Germany	1,462.8	1,843.8
Greece	23.4	8.3
Hungary	19.3	49.2
Ireland	8.6	18.4
Italy	465.7	398.2
Latvia	6.3	3.2
Lithuania	4.7	4.8
Luxembourg	9.9	6.7
Malta	7.2	1.5
Netherlands	270.7	225.6
Poland	59.0	38.1
Portugal	63.1	65.1
Romania	10.5	10.6
Slovakia	9.6	1.9
Slovenia	4.6	0.1

		Day Visits (€ million)
Spain	735.1	173.2
Sweden	114.8	11.6
United Kingdom	279.2	397.0
Total	4,834.4	4,098.1

There is no definitive value for industrial heritage tourism to the European Union economy. This study has estimated its economic impact based on fractions of existing tourism flows. The total number of tourism trips and day visits motivated by industrial heritage in the EU is estimated to be approximately 157 million, with a direct spend of almost €9 billion annually. Total impact is likely to be significantly larger when the indirect and induced impacts are taken into account. This is particularly the case for many industrial heritage sites which tend to be locally based with strong links to local communities, increasing the local economic impact[18].

4.2.   The Economic Impact of Rural Tourism

The problems of data collection noted above are equally great for rural and agri-tourism. As a result, it is often not fully realised how strong the rural tourism sector can now be. In part that is because of the integration of many parts of the sector within other sectors. Many farm accommodation enterprises are financially integrated into the agricultural activities of the farm: profits from accommodation are set off against losses on the farm. Visitor purchases in village and small town shops are not differentiated from local people's purchases. Visitor numbers are rarely recorded separately by public transport undertakings, yet they are often essential in maintaining viability; that is a very real problem when assessing the viability of rural railways, where a majority of tickets may be issued outside the rural railway at stations in large urban areas. In terms of jobs, the prevalence of pluriactivity in the rural tourism sector – (one person working in more than one job, and often in jobs in more than one sector) – makes accurate assessment of job numbers difficult.

The importance of rural tourism in the UK was only fully realised in 2001, when Foot and Mouth disease spread across the countryside and rural tourism was largely stopped by movement restrictions of various kinds. In calculating compensation measures, the government found that national rural tourism revenues in 2000 were estimated to be around €14 billion, compared to €18 billion from the agricultural sector. Rural and farm tourism in the UK employs over 380,000 people in 25,000 businesses (Sharpley & Craven 2001). In many of the UK's rural regions, tourism is more important financially and in employment terms than farming.

EuroGites, the European rural tourism umbrella group, collected financial data from its member associations in 2008, and extrapolated that information to include known bed numbers from associations outside its membership. These calculations suggest that rural

---

[18]   See for example a study commissioned by the Countryside Agency and the New Economics Foundation, Sacks, Justin (2002) "The Money Trail", London, New Economics Foundation.

tourism supports 900,000 direct and indirect jobs in Europe, and generates €150 billion in gross income each year (EuroGites, 2009a). These figures are estimates but there is currently no way of getting more definite statistics. It seems that they are unlikely to be wildly inaccurate – indeed they may be underestimates - when set against the few national statistics that we have for rural tourism. The UK government found that national rural tourism revenues in 2000 were estimated to be €14 billion (CMSC, 2001; Sharpley & Craven, 2001). Government figures for 2009/ 2010 for England alone now show that rural tourism is worth over €34 billion, and accounts for over 12% of rural employment[19]; 10% of rural businesses are tourism related.

The potential demand for rural tourism can be seen in the impacts of visitor numbers and tourism spending in Europe's protected areas, many of which are national parks. UK statistics show that the percentage of tourism related business and employment in National Parks is double that of rural England as a whole: in National Parks 27.5% of businesses and 21.2% of rural employment are tourism related[20]. Similar figures have been reported for other parts of Europe (Getzner et al, 2010; Getzner, 2010a). National Parks have strong brand image and obtain marketing benefit from that brand image: similar brand images could be created by skilled marketing for other – though not all – rural areas.

Rural tourism is, therefore, worth approximately 10 times in income terms that of industrial heritage tourism on the basis of the available statistics.

4.3. Other benefits of industrial heritage tourism and rural tourism

There are a range of other benefits to be found for both the above special interest tourism areas over and above income and job numbers. Some of these are discussed below:

New skills and training

Both types of tourism encourage people to train to gain new skills, especially in customer care, hospitality, IT skills and marketing. In the past, these areas were relatively unknown in declining industrial and rural regions. There are many anecdotal instances of tourism trained people then using their new skills to take other jobs, often in service industries or in manufacturing which has relocated to an area. In former coal and steel areas, this can be an important part of the de-industrialisation process, tourism helping to train a new type of service skill amongst workers. It begins the slow process of changing mindsets (Cole, 2004). Jones and Munday (2001) commenting about the Welsh industrial heritage town of Blaenavon note that it is on-going process for the Blaenavon Partnership even after 15-years. It helps former coal and steel towns to become attractive for new industries.

Within some branches of industrial heritage tourism, special skills training linked to metal and wood working have evolved. Discussions with FEDECRAIL, and with heritage rail and heritage waterways operations, reveal a range of specialist skills training schemes operated in Austria, Belgium, Germany, the Netherlands and the UK. Some have prospered. Many have found problems in obtaining recognition from educational authorities, in working in

---

[19]   http://www.defra.gov.uk/statistics/rural/the-rural-economy/rural-tourism/.
[20]   http://www.defra.gov.uk/statistics/rural/the-rural-economy/rural-tourism/.

partnership with educational organizations, and in finding national and European contacts with which to confer and learn. Comprehensive heritage conservation training schemes to allow qualified people to work in wood and metal for both historic buildings, machinery and equipment have been considered, although as yet none of these holistic schemes appear to have been successful. In the UK a privately financed and well publicised foundation, the Waterman Railway Heritage Trust, currently employs 30 apprentices through a government Jobs Fund Scheme aimed at 18–24 year olds who have been unemployed 6 months or more (www.lnwrheritagecompanyltd.com/group-news/group-news.html).

In Germany, the Meiningen Steam Locomotive Works in Thuringia is a major example of skills training and transfer linked closely to industrial heritage tourism (http://www.dampflokwerk.de). Originally opened in 1863, it is now the major centre for parts production for the over 3,000 heritage steam locomotives in Europe[21], along with heritage electric and diesel locomotives and rolling stock. From time to time it builds new or replica steam locomotives. It has become a major tourist attraction in its own right. It employs over 100 engineering specialists plus support staff.

Addressing depopulation

Depopulation has been a problem in rural Europe since the nineteenth century, linked largely to the decline in the agricultural work force, and the tendency for manufacturing and services to concentrate in cities. Although, in principle, depopulation is not "wrong" as a rebalancing of population distribution, it increases congestion in urban areas, brings a depressed outlook in rural areas, and creates problems in maintaining rural services. Declining industrial areas now have similar issues (see Annex G, G1 & G2). Rural tourism, and to some extent industrial heritage tourism, has begun to reverse that trend, directly through increasing local incomes, and employment, but also in other ways:

Service retention

As noted above, one of the problems in declining rural and urban areas is that of maintaining essential health, retail, educational, transport and other services for ever smaller populations. Tourism increases the local market for services and begins to create a virtuous rather than a vicious circle for service retention in these areas.

Attracting in-migration

While out migration and depopulation still goes on, a reverse and often equivalent flow of in-migration has been noted in many parts of rural Europe, and in some formerly declining industrial areas. Tourism has been responsible for part of that process, especially in rural areas. This process, known as counter-urbanization, owes much to the movement of life style entrepreneurs from cities to countryside, bringing with them capital, market knowledge, entrepreneurial skills and contact networks. This process, while owing much to tourism, is also linked to the spread of e-mail and internet communications, allowing distance working in many sectors. Examples of life style entrepreneurs in rural tourism are given in Annex G, G4.

---

[21]   Of which c. 500 are typically operational in any one year.

Housing

The building sector has grown as a result of industrial heritage tourism growth, and especially because of rural tourism. Both have encouraged property improvements, extensions and some new build. In turn this is linked to rising property values. Tourism has created demand for re-using redundant farm and industrial properties for either overnight accommodation or for tourism linked retailing/workshop and food/beverage service purposes. In some cases, arts performance or heritage centres/museums have recycled redundant buildings. Rising property values help restore confidence in an area, although as noted later may become a problem in some cases.

Opportunities for women

In both rural and industrial areas, tourism development has brought employment opportunities for women in areas once dominated by male employment. This has increased participation rates, cut female outmigration, raised incomes and introduced new initiatives into communities – classic examples include the several women's co-operatives in Santorini, Crete (e.g. Avalona[22]), the Clatt community tea rooms in north – east Scotland[23], and many others.

Image building and synergies

Synergies between farm production and tourism has had beneficial effects on marketing and image building for both sectors, a development commented on by the OECD's pioneering studies in niche market development (OECD, 1995) and picked up notably by the emergence of wine tourism (Hall and Mitchell, 2000).

Creating a focus for regional planning and regeneration initiatives

Tourism developments have begun to be chosen as key players within regional planning and regeneration initiatives, chosen for their ability to change the image of a region, attract potential life style entrepreneurs, make better use of heritage assets, increase employment, increase income and attract new capital. The best known use of industrial heritage tourism is that of Germany's Ruhr Industrial region – see 5.1.6. – but smaller scale initiatives include Blaenavon in Wales (Appendix G, G1) and Haslach in Austria which brings rural tourism and industrial tourism together (see 5.3).

Environmental benefits

Both industrial heritage and rural tourism can have environmental benefits, largely because they valorise environmental conservation and enhancement. Industrial Heritage tourism development has encouraged public sector and in some cases EU investment in the urban environment and in clearing contaminated and unsightly land in former industrial areas. Without the input and justification provided by rural tourism, the conservation of Europe's rural landscapes, ecosystems, built environments, communities and cultures would be hard to justify. Many more farmers now realise the value of landscape and wildlife conservation, and that rural environments can produce wealth through visitation rather than solely through food production. Conservation is valorised by rural tourism. The wider community, urban and rural, requires traditional countryside for sport, physical and mental wellbeing

---

[22] http://members.virtualtourist.com/m/p/m/202e02/.
[23] www.grampiancaredata.gov.uk/index.php?option=com.

and for educational purposes. There are now over 10,000 rural landscape and biodiversity protected areas in Europe (see Shipp, 1993), each requiring public sector financial and political inputs for conservation purposes. These inputs can be justified by the economic benefits flowing from tourism. The need for a strong linkage between the finances of protected area management and sustainable tourism was recognised and discussed by Shipp (1993) and more widely by Eagles (2002). Ways to make those linkages work have been researched and outlined by Merkl (2003), Emerton (2006) and Drumm, (2007).

Socio-cultural benefits

In socio-cultural terms special interest tourism has maintained social life and traditional ways of life in many areas.

Perhaps the most typical socio-cultural benefit in both rural and declining industrial areas is the recognition and celebration of past ways of life, giving relevance to the lives and memories of older inhabitants, and linking those lives to the present day and to the future (Taksa, 2003). Local pride increases place attachment and place identity for both local people and visitors.

Secondly, many communities have gained considerable benefit from taking part in the development and management of local tourism, gaining community strength from that involvement[24].

A third benefit comes from "traditional" skills retention, be they agricultural, architectural or industrial. Loss of skills loses inter-generational links and begins a process of loss of authenticity (Xie and Lane, 2006) and can mark the eventual end of the road for the conservation process. The founder of the traditional small craft heritage centre at Mystic Seaport, USA, a key early industrial tourism centre, the late John Gardner summed up the need for hands on socio-cultural conservation linked to tourism:

"*Museums for the most part are very short sighted … interest in old boats and ships is bound to die out as the generations that were close to them pass away …* (and as for heritage in general …) *You can't preserve skills unless you acquire them, and the only way you can acquire and retain them is by practice, by use.*"[25]

Three practical European examples of the John Gardner philosophy can be quoted. The Roskilde Viking Ship Museum's Boatyard in Denmark[26] – has regenerated lost skills in traditional boat building through enlightened commercial use, building new "Viking" longboats. In Wales, the Big Pit at Blaenavon now trains heritage miners to a professionally certified level (see 5.1.1). In Italy the European Centre for Training Craftsmen in the Conservation of the Architectural Heritage, Isola San Servolo, Venice, trains people in working on a range of heritage materials. But there is little coordination and rational expansion of this area of activity, and a European level approach could provide important economies of scale and networking opportunities. Heritage techniques training facilities can also become tourism attractions in their own right.

---

[24] A useful guide to the processes involved can be found at: http://www.sustainabletourismonline.com/41/culture-heritage/assisting-communities-to-develop-heritage-tourism-opportunities.

[25] John Gardner, boatbuilder, writer, thinker, trainer and educator. Born 1905; Died 1995, cited in *The Guardian,* 20/1/1996, Obituary by Christopher Dodd.

[26] http://www.vikingeskibsmuseet.dk/en/boatyard/.

Finally there is a wider community benefit that needs to be stressed. Without tourism, much of our man made heritage would have been lost. Tourism has, when well-managed, become a great conserver. At the same time as it has created jobs, brought capital and income to declining areas, and acted as a conservation agent, it has enriched the lives of enormous numbers of people by giving them added insights into the past, and how people have managed their lives and their communities in the past. Industrial heritage and rural tourism have moved tourism on from rest, relaxation and sometimes hedonism to provide a thinking person's tourism, encouraging enquiry and understanding. In doing so, it has helped create new art forms – applied art of a special kind. That art form needs tourism to unlock its worth – national parks, eighteenth century canals, and heritage buildings are not transportable, cannot be auctioned like great paintings or sculptures.

4.4.   Dis-benefits

There can be some dis-benefits, especially in sensitive areas, arising from both industrial heritage tourism and to a much greater extent, from rural tourism development. Most can be reduced by informed management. They include:

- Physical damage to fragile ecosystems can be created by too much unmanaged visitation. Krippendorf (1984 and 1986) listed the main issues nearly 20 years ago. Loss of tree cover on mountain sides because of ski-run, road and car park construction leading to landslide and related erosion; trampling of vegetation by large numbers of hikers; the growing urbanisation of scenic areas; noise and litter disturbance to wildlife. Shipp (1993) extends the list of issues in Europe's protected natural areas - including pollution of water courses, air pollution and new types of damage created by mountain biking, rock climbing and orienteering and other technological developments.

- The arrival of incomers purchasing properties for second home use can be a problem, especially in conservation areas where new building is restricted. Competition for limited numbers of houses can increase house prices beyond the reach of local people. While planning and management measures can address that problem, they can be politically controversial.

- Loss of rurality: tourism can be an urbanising influence on the countryside, encouraging cultural and economic change, and new construction.

- The economic stability of the rural world can be threatened by new, perhaps large scale, tourism businesses seeking short-term gains, upsetting labour markets and land values, and becoming powerful in the governance of the region.

- The cultural heritage of the countryside may be at risk from outsiders and powerful outside cultures.

- Visitors can now penetrate any and all rural regions, no matter how remote. The long-haul flight, the hire car, the 4-wheel drive vehicle, GPS, coupled with the power of television's travel programmes which seek new "undiscovered" areas – all present a challenge to the survival of traditional rurality – and to wilderness, a very rare and precious commodity in Europe.

- An over-reliance on tourism can create economic risks, given volatile exchange rates, growing competition from other tourism areas, and economic downturns.

While most of these dis-benefits can be addressed by management techniques (and Shipp, 1993, provides a useful summary of those techniques, despite the age of that publication) there needs to be political will to devise and use them. That will is not always easy to bring to bear in some circumstances.

Finally it is important to comment on the popular belief that a more professional approach to these niche forms of tourism will result in loss of local character and regional diversity. There is no evidence to support that belief. In part that is because rural tourism is very much a micro-business activity that owes much of its character to the many thousands of individual entrepreneurs. The role of multi-national branded and standardised hotel chains is very small in this sector. In part, the huge variations in geography, climate and history across Europe act as a brake on trends towards uniformity. Many emergent niche products are built upon diversity and locality – food tourism is a classic example. And tourism management scholars are very much engaged in the search for, and retention of, local authenticity – Xie and Lane (2006) provide an entrée to this issue. It could be that professional management will seek to prevent rather than encourage regional uniformity.

5. CASE STUDIES

This section provides case studies designed to show the rich complexity of the issues surrounding industrial heritage and rural tourism. This is important: any European policy and/or initiative need to understand that complex background.

The studies do not follow an identical pattern in all cases. In part that is because they cover many very different organizations and subjects. In part it is because they are drawn from very many sources, and from a range of countries: "official" sources rarely report to a common format, even within the same country. Those based on peer reviewed research have similar problems. Tourism is researched by agricultural researchers, business specialists, economists, ecologists, geographers, land use and regional planners, marketing specialists and sociologists as well as in over 140 specialist tourism research journals. Each specialises in different activities, and has different cultural and technical requirements.

5.1. Industrial Heritage Case Studies

Industrial Heritage tourism seeks, where possible, to:

1. Conserve heritage *in situ,* and often in a relevant landscape or townscape, not taken away to a museum.
2. Display *working heritage* – of great interest to visitors because it is working and very apt since industrial heritage is about work.
3. Provide a link to a fast disappearing social and cultural heritage – it conserves "the arenas in which that ... historic drama is salvaged and retold" – (Samuel, 1994, p6).

There is a complex and fascinating story to tell, peopled by remarkable characters.

Industrial heritage tourism was begun not by enthusiasts seeking to develop tourism but by enthusiasts seeking to conserve industrial heritage. Tourism was a way of financing conservation through entrance or user fees and an advantage when seeking public money to conserve heritage. Tourism has increasingly funded, and could further fund, industrial heritage conservation. The case studies illustrate the problems that industrial heritage tourism faces, and some of its great successes.

The selection of case studies was difficult. Key thematic areas were selected, and within those areas studies were taken to illustrate both common problems and good practice. *Coal Mining* (5.1.1) based tourism was chosen because of the central role of the coal industry in Europe's industrial revolution, and the large scale, and financially demanding nature, of coal heritage tourism sites. *Textile industry* (5.1.2) based tourism illustrates another major European heritage industry, very different to coal mining tourism, linking to art and design as well as to specialist machinery. Despite the importance of textiles to our daily lives, textile tourism requires very skilled marketing, product development and hands on interpreting facilities. An additional textile based case study can also be found at 5.3, a study of Haslach in Austria, an area that brings industrial heritage and rural tourism together. *Railway based* (5.1.3) tourism was chosen for its ubiquity, and its strongly visual and frequently hands-on attractiveness for many tourists. It is an activity that attracts many volunteers. Railway based tourism can also have a life after railway closure; railways can live on as walking, cycling and riding routes. The operation of an *outdoor industrial*

_____

heritage museum is described (5.1.4). A case study of Europe's premier industrial heritage tourism area, *Germany's Ruhr region* illustrates the use of industrial heritage as a powerful regional planning and regeneration tool (5.1.5). That study is followed by an analysis of a much lower key, but more typical, industrial heritage region in Germany, the *Brandenburg area*, setting out issues and possible solutions. Additional examples of regeneration through industrial heritage can be found in Annex G to this study, as G1 and G2.

Some important study areas, including canal and maritime heritage tourism, have been omitted because of pressures of space.

5.1.1.   Coal Mining-related Heritage Tourism

Mining is central to industrial heritage. Coal mining helped launch the industrial revolution. Europe's greatest industrial complexes were based on coal. Iron mining came second to coal as a major extractive activity.

Industrial heritage tourism linked to mining is, however, rare. The most interesting tourism mines are open to the public, underground and deep. They are all potentially dangerous. They require stringent and expensive safety precautions, expensive pumping systems to prevent flooding, forced air ventilation systems to remove gas and improve air quality, plus highly qualified staff. Public ownership in various forms seems the norm. The case study below illustrates these points.

In addition to many small surface museums, there are a few small-scale coal, iron and other heritage underground mines that are open to the visitation. Examples include:

- The German Mining Museum - Das Deutsche Bergbau-Museum – in Bochum, North-Rhine Westphalia, one of the best visited museums in Germany, with approximately 400,000 annual visitors, is in public ownership and has an underground demonstration mine, especially constructed for visitation.

- Austria's Iron Ore Mine at Eisenerz, in Styria[27], offers summer only access to the now inactive underground mine – surface mining continues. Opened in 1986, it is in the ownership of a Foundation owned by the province of Steirmark, and operated by a local company. Visitor numbers are high at 80,000 per year during its operation from May to October. It offers underground tours, trips in adapted mega-transporters and observation of ore blasting.

- Italy's Talc and Graphite mine at Scopriminiera, 70 km from Turin, offers a museum and 3.5km of guided underground tunnel access[28.]

The Big Pit, Blaenavon, South Wales

The Big Pit at Blaenavon in South Wales is about 50 km, or an hour's drive, north–east from Cardiff. It is part of the Blaenavon World Heritage Site (WHS) industrial heritage complex. It is a rare example of a deep (90 metres) coal mine open to the public with underground guided tours throughout the year. It is a major national attraction, and most visited part of the WHS.

_____

[27]   www.abenteuer-erzberg.at/.
[28]   www.scopriminiera.it.

The mine opened in 1860, producing coal for the local iron works and for distribution by rail around the UK and beyond. By 1910 it employed 1300 men. Employment slowly declined to 400 when it closed as a working mine in 1980. By 1983 it had reopened as a visitor attraction operated by a local Charitable Trust. It quickly became popular but had financial problems because of the need for capital investment in visitor facilities, and because of competition from other regional attractions. In 2001, it became part of the public sector National Museum of Wales, joining a slate mine and a small textile museum plus 5 other more conventional museums across Wales.

This study shows that high visitor numbers that can be achieved by a relatively remote site that is well financed, well marketed and well interpreted. It has access to skilled staff at the National Museum, who can afford to carry out and act upon the visitor research shown above. And visitors do not pay to enter the Big Pit. There is a large and interested audience for an authentic deep coal mine visitor experience. But such attractions appear to need constant public sector support. The additional case study in Annex G on the Blaenavon World Heritage Site (WHS) shows that there is little linkage in the minds of visitors between the other attractions of the WHS and the Big Pit. Despite many years of WHS management, Blaenavon has not become a full service resort, has no accommodation sector nor has it developed place attachment.

Becoming part of the National Museum gave the Big Pit access to capital investment, professional marketing and interpretation and to the national policy of free access to all visitors. A new shop, restaurant, a multi-media virtual gallery, a blacksmith's shop and state of the art interpretation centre complimented underground tours led by trained and experienced ex-miners. The Big Pit became a must-see part of the curriculum for most schoolchildren in Wales – and in adjoining parts of England. Visitor numbers peaked at 158,000, and are currently around 150,000 per year. Total turnover of sales and grants is now €2.4 million per year and 65 people are employed. A survey in 2008 suggests that the contribution of the Big Pit to the national economy is approximately €4.8 million per year. The Big Pit is an Anchor Point on the European Route of Industrial Heritage, and an enthusiastic member of ERIH.

A visitor survey taken in 2007 found that:

- All visitors travelled by car: 85% came from within one hour's drive
- 32% were on holiday; 68% were day visitors from the local area
- Average length of stay was 2 hours 30 minutes
- 39% were repeat visitors – a remarkably high figure

Main motives for visiting were:

- Recommended by friends etc., good reputation   28%
- Wanted to experience history, etc.   20%
- Wanted to show a visitor Wales and its heritage   18%
- Free entry   20%
- The children   9%
- A day out   14%
- Want to go underground   8%
- Had a mining background/family   8%
- Been before and liked it   10%

Best liked features were:

- The guides   65%
- It was free and offered so much   32%
- Going underground   28%
- The whole thing   25%
- The galleries   24%
- The darkness without lights   14%
- The baths/interpretation   8%

In both the above, interviewees could name more than one motive – hence these numbers add up to more than 100%. Interestingly, the majority of visitors -over 80% - were not influenced at all by the sites World Heritage Site status

Source: Red Kite Environment, 2007.

5.1.2.   Textile Industry Heritage Tourism

Textile heritage tourism is widespread in Europe. It is supported by an active group of artisan textile producers and enthusiasts. It finds the public hard to convince about its value as a tourism attraction, but there are many pointers which suggest that the situation could be improved by better market knowledge and marketing, better management and better interpretation.

The Audax Textile Museum Tilburg, The Netherlands

Textile production was a traditional industry in the eastern Netherlands; by the seventeenth century hand-loom weaving was well established in Tilburg. By 1881 there were 145 mills in the city. Mills and mill buildings deeply influenced the life and townscapes of the region and especially in Tilburg. It employed many thousands of often highly skilled people. And then, in the 1960s, like other textile regions in Europe, the industry declined rapidly, with both domestic and export markets suffering price competition from low cost producers outside Europe. The majority of mills closed; many were demolished.

The Audax Textile Museum Tilburg honours that almost totally lost history. It has created a very special place, and potentially, an ideal industrial heritage tourism resource. More than any other textile industry heritage site, it has bridged the tantalising gaps between the textile production of the past, the present and future. It is revered by textile experts across the world. It holds exhibitions and master classes; it has exciting educational links and courses in partnership with European institutions across Europe, and an exchange programme with the renowned American Textile Museum in Washington DC. It is a working museum: it produces avant garde textiles in full view of visitors. It is an aesthetic feast of colour and texture. And yet it is visited by relatively few tourists. This case study examines why this vibrant and valuable resource comes so close to being a model site – but yet does not quite achieve the holy grail of linking past and future for non-specialist tourists, of stimulating the minds of tens of thousands of potential visitors. More prosaically, it is far from self-sufficient in financial terms. It is, however, important to say at the outset of this case study that the management of the museum is fully aware of these problems and is working on them. There are three key questions highlighted by this case study. First, financial resources are not a major problem, but lack of knowledge of the markets for industrial heritage tourism is major problem. Secondly, there is insufficient knowledge about how to supply the markets with the products that are wanted by those markets. But the third and key problem for the Museum lies beyond their immediate control. Tilburg does

not try to attract visitors, despite the rise in city tourism noted earlier. The city's web site is unattractive, dull and unhelpful. There is no tourism development campaign. Without an active city/regional tourism marketing campaign it is difficult for industrial heritage sites to attract visitors from beyond the local area. Linkages between tourism and heritage interests are essential.

The Museum's past

The museum was founded in 1958, moving to larger premises, Mommers former textile mill, in 1982. It expanded further, and in 2008 a stunning ultra-modern glass based entrance building was added, housing a reception, cafe/restaurant, expanded shop, and a range of conference and exhibition rooms.

The museum has always prided itself on being a working museum. While it has an important archive collection of textiles, machines and documents, it is also a place where the visitor can watch artists and technicians producing exciting new works. It buzzes, if quietly, with activity.

The museum was originally founded by the Tilburg City Council. In 2002, it became a non-profit foundation that brought together three other Tilburg museums – the Tilburg City Museum, the De Pont museum of contemporary art, and the Scryption museum for written communication. The City Council continues to fund 70% of the textile museum's expenditures. Annual turnover is around €5 million.

Visitation and the Future

The museum had 50,000 visitors in 2011, a number below its peak. It is far less than a visitor attraction of its size and location would expect: at least 100,000 should be a possibility. There are 40 paid staff (some working in textile production), and about 50 volunteers.

Why does the Museum attract so few visitors?

This museum is a case study of a living museum, connecting the past with the future, and doing many things well. But it is also a case study of the problems which hold industrial heritage tourism back from attaining its full potential. It is a wonderful place for those who know about textiles. Its staff know about textiles: they do not seem to know about tourism. The main issues are presented below:

- Not all industrial activities are suited to tourism. Textiles are not an easy subject to attract visitors. There are few members of the public who know about how textiles are made. The last mills in the Netherlands closed over 40 years ago – the local nostalgia market is not strong. Special efforts must, therefore, be made to attract people and to get place attachment and repeat visits.

- The museum is a must-see for textile specialists. The museum assumes that it is relevant to the average person: it does not, however, offer a "layered" programme of interpretation, attractive to different types of people.

- There appear to be few exhibits/activities for families with children, normally a strong market for museums of all types.

- While textile production can be seen, it is not explained in a way that is accessible to non-textile specialists. The technicians are, rightly, too busy to speak to visitors. There could be, however, many alternative ways of making useful contact.

- Welcome is weak. This is a common problem and could be easily solved by well trained volunteers.

- The number of volunteers is not very large: it could be much larger. For an example of a very successful technical museum with a very successful volunteer programme, go to the Sydney Power House Museum web site[29].

- It is widely known in museum and gallery circles that the cafe and shop are of great importance in attracting visitors and raising revenue, even from people who do not visit the museum. The layout of the entrance area does not allow this to happen, and the atmosphere of both cafe and shop are not stimulating.

- The museum is largely explained for Dutch speakers only. Yet Tilburg is situated close to large numbers of German and French speakers, and many other nationalities can speak English.

- The Museum is hard to find. It is signed off the main ring-road, but with a few small signs, using thin blue script on a white background, scarcely legible for drivers concentrating on traffic. Brown Signs are used for tourism purposes in many European countries, and are much more legible.

- Once close to the museum, it is again hard to find, being set back from the road. Surprisingly, there are no large hanging textile banners which are now readily available, and are used, for example, very successfully by the Canadian Textile Museum in Toronto.

- There are no obvious links between the four museums within the foundation – even though one of them is close to the textile museum. They could share marketing, practice synergy marketing, become the Tilburg Museum Quartet.

- The museum is less than 130 km from the German border. German museums have been revolutionised in recent years, not least by the "Long night of the Museums" concept (Lange Nacht der Museen). There is little sign of German ideas here[30].

- There appears to be no Visitor Experience Plan, no Interpretation Plan, and no Marketing Strategy. This is not uncommon in museums, and often reflects the training of Museum Directors which centres on Curatorship (Chhabra, 2009).

5.1.3.   Railway Heritage Tourism

Railway heritage tourism is widespread and often seen as the jewel in the crown of industrial heritage tourism. This section includes examines a successful heritage railway, a rail route that is now a cycle and walking trail but retains its heritage infrastructure, and a brief discussion about using conventional railways as heritage routes.

---

[29]   http://www.powerhousemuseum.com/volunteers/index.php.
[30]   http://en.wikipedia.org/wiki/Long_Night_of_Museums

The West Somerset Railway, UK

The 33km West Somerset Railway, in south west England was completed in 1874, linking the seaside town of Minehead via rural communities to the county town of Taunton and connections for London. It closed in 1971, but was re-opened by a group of local people and enthusiasts as a heritage line in 1976. They were supported by the Somerset County Council who purchased the track and land of the railway as a strategic investment and now leases the line back to the West Somerset Railway. This study shows that railway heritage that responds to market niches in a professional way and that works closely with tourism agencies and other providers, can be very successful. It also indicated the value of local community links and the enormous value of a highly developed and sophisticated volunteer programme.

The railway is a public limited company; this status enables the company to gain a licence for railway operations and it remains connected to the national rail network. Although trains stop short of the national network for technical reasons, the physical connection remains, allowing summer season charter[31] trains to the line.

The railway operates from February to November, with additional trains in December and between Christmas and the New Year bringing extra income. There are 4 daily trains each way in low season and 7 in high season. Many, but not all, trains are hauled by heritage steam locomotives. There are in the region of 200,000 passengers per year, with August the peak month with approximately 42,000 passengers. The line is ranked in the top 10 of the UK's heritage railways, and recognised as an example of best practice management.

In synthesis, the West Somerset Railway's location, near to both resident and holiday populations is critical to its success. As a 'stand-alone' attraction it would be unlikely to draw many visitors, other than enthusiasts and those arriving on charter services, from further afield. It works very closely with other tourism providers and agencies.

The use of volunteers – in common with many forms of industrial heritage - is very important. The railway would not be financially viable without the volunteer workforce, which is used for both highly skilled and less demanding jobs.

The railway uses a complex fund raising and ownership system which has been very successful. It is a viable company, requiring no direct public support for its operations. It has a large reserve fund and added €190,000 to that fund in 2011.

Further details are available at www.west-somerset-railway.co.uk.

Marketing

The railway produces an annual marketing plan for the year's special events and the scheduled services. Both traditional paper and Internet based marketing is used, with information/timetable leaflets distributed to all local accommodation providers. The railway's website has full details of scheduled services and special events; they also have a Facebook and Twitter presence. The railway attends trade shows, where they represent West Somerset tourism as well as themselves. They have a director's seat on the Somerset County Tourism Association and chair the marketing sub-group of the Exmoor (a sub-

---

[31] The charter train market consists of tour operators who package the core elements (destination, locomotive and rolling stock) and sell train seats and dining facilities to customers. Charter trains operate from London and from the north. They are common practice at many UK heritage railways

region) Tourism Partnership; they also work with tourist information centres and tourism officers in the wider region. They participate in Visit England campaigns and research.

The railway's location is central to its success. The region is one of the UK's most popular holiday areas, with in excess of 20 million overnight visitors and 141 million day visits annually. It is within less than two hours travelling time of the Bristol region with its population of around 900,000 and Exeter, with around 140,000 people. The railway is a working heritage experience for the important day visit market. It works closely with other tourism providers, offering tickets packaging the railway with entrance fees for specific local attractions, thus broadening its market and assisting other local tourism attractions.

Employment and volunteers

The railway has 45 full and part-time staff and is supported over 1,000 volunteers. Without volunteers the railway would not be financially viable. Volunteers are used throughout the organisation; the railway employs no engine drivers, all are trained volunteers.

Social benefits

The railway has good relationships with local communities. Some village stations have been adopted by local communities; as well as developing community pride in those facilities, small station shops/cafés run by local people raise funds towards station maintenance.

Although the railway spent approximately €18,000 last year on external training it undertakes most training 'in-house'. As well as developing 'softer' skills (e.g. customer service through *welcome host* courses), many volunteers learn heavy engineering skills in the railway's workshops, including welding and machine tool operation. This builds local social and skills capital, a factor often overlooked when assessing the value of heritage tourism.

Income, funding and economic impact

The railway's turnover exceeds €3 million annually. Although a public limited company there is no profit distribution; all surpluses are retained for future investment. The total economic impact of the railway on the local economy, including direct, indirect and multiplier effect is €5.7 million (see section 4.1 of this study).

The railway also raises funds through its membership (€23 per year) of approximately 4,700 supporters and through share issues. Membership levels has been falling, whilst support for share issues (minimum value c. €120), and legacies have increased. The latter two are used solely for capital projects (e.g. renewal of bridges); membership fees are treated as revenue. Both forms of support are encouraged by a sophisticated system of offering free or low price tickets. In common with many other heritage railways in the UK a number of locomotives are privately owned by enthusiasts either personally or through enthusiast groups, reducing the railway's capital costs and maintenance risks.

Where possible the railway supports local suppliers, for example local beers are highlighted on buffet menus. This increases the indirect economic impact of the railway in the local economy. In a reciprocal arrangement, the railway promotes local accommodation providers on their website who earn a small commission as ticket agents for them.

External issues

New regulations, from the Office of Rail Regulation[32] and Rail Accident Investigations Branch[33], have increased the administrative burden on the railway. Not only has this increased the importance of maintaining more detailed records and audit trails, it has also limited the type of work some volunteers are able to undertake unless they have the necessary safety critical training and can demonstrate appropriate competency.

Vias Verdes: Spanish Greenways

A remarkable feature of railway heritage is that it can be valuable for tourism even when the train service has ceased. The post 1960s reduction of the European railway network made redundant much rail-related industrial heritage, but left a huge legacy of unused traffic free rights of way. There began a random process of either losing the heritage and selling off rights of way and land for development, or using the disused routes for cycle/pedestrian/equestrian leisure and tourism as "greenways" with great tourism potential.

In the USA this problem and opportunity was tackled from 1986 onwards by the creation of a non-profit organization, the Rails to Trails Conservancy[34], aided by federal tax breaks and land banking legislation, backed by a membership of over 150,000 supporters. It has created 20,000 miles of traffic free routes at 1,400 sites. This idea has taken place only piecemeal and on a very small scale in Europe. This case study looks at a Spanish state initiative that seized this major opportunity before heritage and routes were lost.

The Vias Verdes programme in Spain was launched in 1993 to assess and plan the use of closed railway routes for non-motorised transport. The Minister for Public Works, Transport and Environment, together with the two state railway companies RENFE[35] and FEVE,[36] commissioned the Spanish Railway Foundation (FFE[37]) to audit disused railway lines. This identified 98 lines totalling 5,700 km and over 900 stations. An additional 89 privately owned former mining and industrial lines were also identified. This took the total to around 7,600 km of abandoned railway lines across Spain (see Figure 1 below). The case study illustrates the ways in which much can be learned from a knowledge of non-European approaches to industrial heritage, and that heritage assets can be "recycled" to great effect, with tourism acting as a catalyst to valorise that recycling process. The advantages of effective co-operation with national backing are also clearly demonstrated.

The FFE was given on-going responsibility for creating the Vias Verdes (Greenways) from these disused lines. Working in partnership with local and/or regional authorities a detailed viability plan is produced including current ownership, design requirements for visitor use, and future management and maintenance arrangements. The latter can take a number of forms; local, provincial or regional authorities, communities, or through consortia, companies or foundations established specifically for this role.

Over 90 greenways have now been created covering 1,900 km (see Table 10 in Annex D). They offer good surfaces and gentle gradients suitable for cycling, walking and disabled users. There has been no consistent monitoring across the Vias Verdes, but the Girona

---

32   www.rail-reg.gov.uk.
33   www.raib.gov.uk.
34   www.railstotrails.org.
35   Red Nacional de los Ferrocarriles Españoles.
36   Ferrocarriles de Vía Estrecha.

Greenways Consortium estimated that the Carrilet Via Verde which runs from the foothills of the Pyrenees to the Costa Brava attracts around 1 million visitors a year including around 23,000 tourists from outside the region. This may seem a small number but given "*the area through which the greenway passes is relatively undeveloped in terms of tourism and 23,000 tourism-related trips is an important figure considering the size of the local tourism industry*" (Mundet & Coenders, 2010, p671).

Figure 1:   Vias Verdes Greenways Map (green – re-used as greenways, orange passable but not yet greenways)

Source: http://www.viasverdes.com/ViasVerdes/Varios/Mapa%20de%20Localizaci%f3n.

Heritage Preservation

In addition to working with Vias Verdes the FFE has a wider responsibility to identify, restore and conserve Spanish railway heritage, including cultural elements. It supports the work of the Museo del Ferrocarril de Madrid – Delicias[38] and the Museo del Ferrocarril de Cataluña-Vilanova i la Geltrú[39] in conserving the documentary heritage of the railways.

The development of the Vias Verdes has secured the future of a large amount of railway infrastructure, including over 500 tunnels and 1100 viaducts. About 60 former railway station buildings have been renovated and converted to hotels, information centres, museums, restaurants and bike hire centres.

Marketing

Most of the marketing for individual routes is undertaken by the regional authorities, in common with most tourism marketing in Spain.

In 2000 the FFE launched the Vias Verdes website[40]. This provides online maps, background information, contact details and route guides. Three detailed route guides have

---

[37]   Fundación de los Ferrocarriles Españoles.
[38]   Railway Museum Madrid.
[39]   Railroad Museum of Catalonia.
[40]   www.viasverdes.com.

been published, covering over 2,000 km of routes. These are currently only available in Spanish: most of the current demand is domestic. In 1999 an annual *National Vias Verdes Day* was launched, typically on each second Sunday in May. Events are organised by the different consortia for each route encouraging local people to walk and cycle on the routes; these are often supported by local dignitaries or professional cyclists. All routes use standardised signing; Lumsdon *et al* (2009) identified this as important for tourism users of cycle routes. Route markers show the Vias Verdes logo, display route information and often use old railway furniture such as sleepers, thus reinforcing the heritage connections.

Social benefits

In addition to encouraging the active involvement of local communities in their development and providing a valuable resource for healthy recreation for residents, the restoration of redundant industrial assets improves the local environment which is valued by users and non-users alike (Brown, 1997). In a study comparing the costs of traditional recreational facilities, such as sports centres and swimming pools, Palau *et al* (2012, p23) concluded "*that investment in the improvement, development and maintenance of the greenways offer far superior returns per use for the public authorities administering sports facilities.*" A survey undertaken on routes near Girona in Catalonia found that on average 50% of users were women walking and cycling for up to an hour, who are traditionally less likely to engage in active recreation than men (Mundet & Coenders, 2010).

Tourism Issues

Vias Verdes is a good model for the preservation of railway heritage and provides a valuable resource for local communities that has been lost in many other countries. However the FFE's remit limits its ability to extend its work beyond the preservation of railway infrastructure and this prevents it from linking up with other long-distance or local networks of walking/cycling routes.

The Danube Cycle Path in Germany and Austria, part of EuroVelo-Route EV6[41] , is the most popular cycle route in Europe, reputedly with a million users per year, with many tourists from all over Europe and beyond. Guide material is available in many languages. Because the website can only partly function in languages other than Spanish, and because the guides are only in Spanish, the Vias Verdes are not yet fully used as a tourism resource. Its potential could be considerable in spring and autumn because of Spain's climate advantage in those periods.

Operational railways as Heritage Tourism

Most discussion about industrial heritage railway tourism refers to railway lines outside conventional passenger operations, typically railways operated by heritage preservation groups. Heritage tourism can also take place on "standard" operational lines with imagination and initiatives, boosting both rail use and heritage tourism. The value of taking a broad view of industrial heritage tourism development - going beyond the museum concept - emerges here, coupled with knowledge of international ideas, and the key role of market knowledge to guide product development.

The world leaders in using operational railway are to be found in the USA. *Trails & Rails* is an innovative partnership program between the National Park Service and Amtrak,

---

[41]   http://www.eurovelo.org/routes/.

providing rail passengers with educational opportunities that foster an appreciation of a selected region's natural and cultural heritage. The programme links cities and National Parks and provides audio heritage interpretation on selected trains, with texts designed by staff from Texas A&M University. In 2011, 371,865 Amtrack passengers participated in *Trails and Rails* on 1,580 trains.

Attempts at similar programmes have been made on UK railways but have failed because of train operating company disinterest, opposition from trade unions and lack of funding. The Association of Community Rail Partnerships (ACORP)[42] – a federation of over 50 community rail partnerships and rail promotion groups in the UK - has worked on a number of ideas to overcome related problems, and been successful in promoting increased use of railways for rural tourism, and encouraged local groups to "adopt" and look after a number of heritage stations. They have also developed rail linked walking and cycling routes, brought station buildings back to life, and encouraged art and education projects. A German equivalent of ACORP is currently in discussion.

Research on rural tourism use of rural rail lines in UK by Dallen (2007) found that up to 60% of rural rail users were tourists, and that 37% of users had a special heritage related attachment to using trains.

Finally, it is worth noting that heritage rail operation, using volunteer staff, mixes successfully with modern scheduled operation in at least one case in Europe. In Stockholm a modern company operated tram system using 30 metre long cars, line S7, from the City Centre to Djurgården, the city's museum area, shares operations with a volunteer operated heritage tramway using trams up to 100 years old. Over 2 million passengers have used the heritage trams since 1991 without problems.

5.1.4.   The Industrial Heritage Museum

Beamish - The Living Museum of the North

Although industrial heritage tourism is typically found on former industrial sites, there are some cases of successful museum development. This case study looks at a very special type of Industrial Heritage Museum which is recognised as a world leader: the re-created replica open air museum. It examines Beamish in north-east England, situated between the cities of Newcastle and Durham. The purpose of this case study is not to describe the museum in detail, nor to look at the ethics and many issues involved in recreating a "living" past, but to look at the managerial and financial issues of this form of industrial heritage, and as a source of ideas for the development of industrial heritage conservation and tourism. Beamish's experience shows that industrial heritage sites – if well designed and well managed – can be sustainable economically, and can contribute positively to regional incomes. Beamish has strong market knowledge and works very closely with regional tourism stakeholders. Beamish is a special case because of its size and expertise. However, groups of smaller sites working in partnership could achieve similar results. (Beamish is considering setting up a consultancy company to advise others.)

The north-east of England was a major and proud industrial region specialising in coal, steel, shipbuilding and associated engineering. As early as 1958, the idea of a museum to commemorate the region's industrial past was discussed: it was set up in 1970 by the four

---

[42]   www.acorp.uk.com.

major local government units in the region. The 120 hectare site was opened in 1972. It has over 300,000 objects in its collection. It focuses on the region's industrial heritage, largely from the period 1800 – 1940. It includes a small number of buildings originally on the site: the majority of the buildings are, however, either relocated buildings from the region or newly built replicas. It has a range of streets, costumed interpreters, working exhibits, shops, and uses period buses and trams to carry visitors around the site. Purists were and are shocked by it. In his polemic against the heritage industry, Hewison (1987) described it as "more real than the reality it seeks to recall ... a lovingly reconstructed fake". It has, however, been a market success.

While still controlled by local government, the museum operates as a charitable foundation with its income coming from a separate trading company in order to be tax efficient.

After its opening in 1972, visitor levels grew to around 500,000 per year by 1989, and then declined slowly to 300,000. The Tourism Area Life Cycle – see earlier at 2.1 - was in operation. By 2008 the cost of running the museum was close to €5.4 million per year. It was close to an operating deficit. The museum employs 240 paid staff and has approximately 150 volunteers, and it faced a common problem for most forms of industrial heritage that repairs to major items of working heritage machinery and to heritage buildings can be very expensive. At the same time, public sector spending cuts made it imperative that it covered its full operating costs, plus a surplus for future repairs and improvements. A special programme was put in place to solve its problems, based on principles that many other heritage sites might consider. They included:

- Reviewing their weaknesses and treating them as opportunities.
- Creating a detailed recovery plan which positioned the visitor at the heart of the business, carried out market research, sought to increase visitor numbers, offer better value and address seasonality – especially the low level of winter visitation. The detail is important - no single action could have recovered the museum from its serious situation.

In detail, Beamish:

(1) Created many more events and special exhibitions to attract repeat visits.
(2) Concentrated those events in the winter "low" season.
(3) Changed ticketing policies to offer tickets at a slightly higher price that would allow unlimited visits for a year. That gave a strong incentive for repeat visits. Surveys show that repeat visits result in additional expenditure on food and retail sales.
(4) Offered low priced "one visit" winter tickets to tempt new visitors.
(5) Worked with local/regional hotels to encourage low season short breaks linked to Beamish, to attract tourists from beyond the region.
(6) Developed heritage eating, including a coal fired traditional fish and chip shop.
(7) Developed its retailing activities.
(8) Developed new programmes for the school market and other groups, an important source of low season visitation.
(9) Improved staff training.
(10) Attracted and trained more volunteers.
(11) Sought and received capital funds from the Heritage Lottery Fund and the Arts Council to develop new exhibits.
(12) Began to open at night for special events.
(13) Developed outreach events in a range of regional centres.

(14) Introduced better public transport links and shuttle buses: this is especially important in the UK because people over 65 years old can travel free on local buses – opening up a potentially large pensioner market.

(15) Considered developing its own accommodation.

(16) Raised its profile and its marketing work.

Visitor numbers recovered to 498,000 by 2012, despite the recession. Earned income recovered to €7.2 million in 2011, allowing €720,000 to be added to the reserves.

Table 6 below shows sources of income for the year 1/2/2011 to 31/1/2012.

Table 6:   Sources of income at Beamish Industrial Museum

Source	Value
Admission income	€4,250,000
Catering income	€1,193,000
Fish and Chip Shop income	€160,000
Retail income	€661,000
Total earned income excluding VAT, donations and grants	€6,264,000

The important figures to note are those for catering, the new fish and chip shop, and retail sales. It is no longer enough to have industrial heritage. The whole site has to be operated as a visitor experience – and a holistic experience includes eating and shopping.

Tourism

Beamish was planned as a regional museum, with its catchment area limited to the north-east. It is now a long distance tourism attraction, with 68% of Beamish's visitors arriving from outside the north-east region in 2010/11. Of those 55% came specifically to visit Beamish; 87% of those– 215,000 people – stayed in serviced accommodation or campsites and 60% stayed in hotels. The income from the over 120,000 people staying in hotels would alone have been enough to cover all Beamish's operating costs, an indicator of industrial heritage's potential to boost local economies.

5.1.5.   Regenerating Communities and Regions Through Industrial Heritage Tourism

The Ruhr Tourism Region

The Ruhr region of Germany is probably the biggest collection of industrial heritage in Europe. It was Europe's largest industrial region, with 300 coal mines operational by 1850. That coal was exported to other parts of Europe and worldwide, used locally to develop a very major iron and steel industry, and to provide power for numerous manufacturing plants. The population of the Ruhr metropolitan area is now over 5 million, in 53 towns and cities: only four working mines remain. It is one of Europe's top 6 urban regions. It has witnessed a considerable outflow of population to parts of Germany deemed more attractive, and an outflow of industrial production. But it has also become Europe's largest urban regeneration area, a process on-going for over 20 years, beginning with the

International Building Exhibition (IBA) at Emscher Park in 1989 (see ERIH case study at 5.4). Industrial Heritage Tourism has become a vital part of that regeneration process, changing attitudes, changing the image of the Ruhr, and providing jobs and financial inflows.

Within the concept of the Ruhr as a region capable of attracting tourists, there are a number of key ideas:

- That changing the image of a region can help retain and attract people, enterprises and visitors.

- That the industrial past should be understood and celebrated as living history and as a series of art forms.

- Retaining and re-using industrial buildings for tourism and other purposes can be both a "green" solution to recycling and retaining local character and can build brand and place attachment.

- That the industry-linked culture of the region should be recognised and used.

- That investment in the arts and cultural industries can pay dividends in terms of image changing, regeneration and tourism, and that former industrial buildings can provide a unique stage for art and culture.

- That regeneration and tourism should be approached on an active regional partnership basis, not just on a site by site basis.

The dream is expressed in an amended extract about the Ruhr's Emscher Park project[43] "The region's massive and muscular industrial structures are now filled with art, culture, housing, commerce and offices. Concerts are staged in the ageing steel frames of former factories. Grassy recreational areas complete with hiking trails and climbing walls, have been sculpted from the old hills of coal pilings. Cycle and walking paths through glades of trees linking the many different components of the park follow the former industrial roads and rail lines".

The Ruhr has a long history of regional planning dating from the SVR (Siedlungsverband Ruhrkohlenbezirk) of 1920, which planned housing and open space across the region, through to the Regionalverband Ruhr (RVR) of 2004, which extended the regional remit to include developing the regional image as well as regional planning of the built and natural environment. These grand partnerships all aimed to pool the low purchasing power of the many small municipalities within the Ruhr, improve derelict landscapes and overcome the legacies of the region's structural transition (Hall, 1967; Knapp, et al. 2006). Tourism development based on its industrial legacy is seen as selling an authentic and attractive Ruhr regional image, creating something special, reducing travel away from the region and thus boosting the local economy while bringing visitor income from Germany and beyond.

The resultant policies of cultural, recreational and tourism development resulted in €2.5 billion being invested – 80% of it from the public sector – between 1982 and 1999, and the eventual creation of Ruhr Tourismus, a process that began in 1998 with Ruhrgebiet Tourismus Gmbh, leading to Ruhr Tourismus Gmbh in 2009, owned by the RVR, bringing together in partnership the tourism marketing, product development and event planning for the whole region – acting as an umbrella organization rather than supplanting the work of

---

[43] From: http://sustainablecities.dk/en/city-projects/cases/emscher-park-from-dereliction-to-scenic-landscapes

tourism organizations across the 53 local authorities in the region. It also acts as a tour operator, ticketing agency and event organiser. It has a staff of 36.

Ruhr Tourismus uses the concept of the *Die Metropole Ruhr*, the Ruhr Metropolis, as a brand name to emphasise the region's importance, its new and fashionable approach to the past and the future. Its web site[44] opens with the following words:

"*During your trip to the Ruhr metropolis, you may choose from 3,500 industrial monuments, 200 museums, 120 theatres, 100 cultural centres, 100 concert halls and 2 famous musical theatres – an exciting composition of culture and entertainment* "

Note that industrial monuments come first. But they are not alone, industrial heritage alone does not make a destination – see the earlier study of Tilburg's Textile Museum (5.1.2).

Ruhr Tourismus has been successful. Much of that success come from intensive and on-going market research, market linked branding policies, excellent web sites, and a strong "can-do" mentality. The work of the organization can be judged from its valuable detailed review and strategy document for 2012-2016 (Ruhr Tourismus, 2011). It has seen 10% year on year tourism growth in bed nights in recent years, and 49% growth over the decade 2000-2010, well above the all-Germany growth rate of 29% for that period. A total of 6.8 million bed nights were achieved in 2011. Industrial heritage experiences scored well in several visitor surveys – but so did shopping possibilities, events, sport, parks and theatre, reinforcing the point that industrial heritage tourism does best when accompanied by other activities. This is not a peculiarity of industrial heritage tourism – it also applies to nature tourism (Palacio & McCool, 1997) and to a range of other situations.

One of the Ruhr's major achievements was to have Metropole Ruhr chosen as Europe's Cultural Capital 2010 alongside Istanbul and Pecs in Hungary. More prosaically, but of enormous practical significance, was the introduction in 2011 of the Ruhr TopCard, a prepaid chip card (€47-90, adults; €32-90 children) giving free entry to over 90 attractions and half price admission to many more. This helps ensure longer stays and can reduce carbon emissions by helping retain the local population in the region.

Could the Ruhr Tourismus concept be introduced elsewhere and on a smaller scale? There seems no reason why not. A similar small scale company was created recently by the several local governments working along the Hadrian's Wall Roman site in the UK some years ago. Hadrian's Wall Heritage Ltd (HWHL), a company limited by guarantee, aims to make the most of the Wall for its community and region, while ensuring the conservation of Hadrian's Wall[45].

Specific Examples

Two specific examples of the remarkable re-use of industrial heritage should be mentioned amongst many.

The Oberhausen Gasholder/Gasometer Oberhausen

The largest disc type gasholder in Europe, a huge cylinder 118 metres high and 68 metres in diameter, was completed in 1929 as part of the gas control and storage system for the

---

[44]   www.ruhr-tourismus.de.
[45]   www.hadrians-wall.org.

local iron works. It became redundant in 1988. It had become not just industrial heritage but a local and regional landmark. By 1994 it had been converted into two huge exhibition and performing spaces, hosting up to 500,000 visitors each year[46].

The Zollverein Coalmine and industrial Complex

The Zollverein coal mine complex, opened first in 1847 and completed in 1932, with an ultimate working depth of 1200 metres, was closed for production in 1983. The enormous site, with its famous Bauhaus style pit head gear dating from 1932, was in danger of clearance but was purchased by the regional government in 1986 as an historic monument, and is now controlled by a foundation. It became a World Heritage Site in 2001. It now acts as a heritage site, museum, gallery, shop and restaurant – with an all time visitor total of 2.2 million in 2010 – when part of Europe's capital of culture. 2011 was a more "normal" year with 1.5 million visitors[47].

Industrial Heritage Tourism in Brandenburg, Germany

This review, based largely on a consultancy study is included as a contrast to the case study of the Ruhr area. The Brandenburg region, though close to Berlin, still suffers deprivation from its time in the German Democratic Republic. A consultancy study explored what could be done to use its industrial heritage to improve its position (Datzer, Seidel & Baum, 2010). The situation revealed is typical of very many regions. Equally, the answers to the problems are typical of an effective informed partnership development approach likely to work in most parts of Europe, and reflects the need to add tourism skills to conservation skills at most sites. The existence of a small number of well-run sites found in Brandenburg, against a background of many less professional sites is quite usual, as is the need to restrict the number of sites to avoid oversupply and market failure. Themed, layered and relevant interpretation was found to be essential – which in turn requires a basic knowledge of the market segments involved, and linkages to marketing strategies.

Brandenburg is one of Federal Germany's 15 semi self-governing regions; it surrounds, but does not include, the capital city, Berlin. It has a population of 2.5 million, on a land area of 25,000 square kilometres. Never heavily industrialised, it nevertheless has 3 major industrial heritage sites and at least 88 other recognised sites. The survey results discussed here (Datzer et al, 2010) were based on a postal questionnaire to 79 sites (58 (73%) of which replied) followed by 10 semi-structured interviews with key players in the region.

Key survey findings included:

- Industrial heritage is widespread and varied: it concentrates on open cast brown coal production, textile production and brick production.

- 60% of the replies came from museums.

- Half of all the sites have only opened to visitors in the last 10 years.

- Most sites are not open every day.

- 75% of sites charge an entrance fee; most are €5 or less.

- Most sites had exhibitions and/or events.

---

[46]   www.gasometer.de.
[47]   www.zollverein.de.

_____

- Together the 58 sites have 900,000 visitors per year, 8 sites accounted for over half of the 900,000; 61% of sites had less than 10,000 visitors each year.

- Modern interpretation methods (audio guides, print materials in a range of languages etc.) were rare, but most sites did offer guided tours.

- Transport between sites is not easy. Marketing linkages between sites are few.

- Signing was not good.

- The main audiences were school groups, families with children and the over 50s.

- Most sites relied on websites and print materials for marketing. Marketing was very limited with 75% of sites having an annual budget of under €5,000.

- The average number of paid employees was 6, plus volunteers.

The key points made in the interviews were:

- Many sites were aimed at educating and informing local people about their local history rather than tourists.

- It was felt that the region has greater potential for tourism growth if marketing was improved.

- One part of the region, the Lausitz, was the only area with high potential, with its concentration of sites and good transport links (around 1 hour) to Berlin.

- The tourism agencies and authorities knew little about industrial heritage and gave it low priority. Heritage sites had weak links to tourism agencies.

- There was no organization or network responsible for improving or developing industrial heritage tourism.

- Tourism infrastructure was poor, with insufficient hospitality and accommodation, information and interpretation.

- Shortage of trained staff and shortage of younger guides.

Possible solutions to these problems included:

- The creation of a forum to take forward the idea of a development network and to lead in introducing innovations.

- Better marketing and linked marketing between sites.

- Staff training about tourism and working with tourists.

- Better links between sites and the tourism industry and vice versa.

- Concentration on improving existing sites rather than creating more sites.

- The development of themes and story lines.

- Concentration on specific markets especially the schools market.

- More use of sites for events.

Staff training is especially interesting because it is part of the task of re-skilling industrial society and changing mindsets, commented on in section 4.3, and backed by a number of researchers (Jones and Munday,2001; Cole, 2004). Staff training although required for tourism can contain key transferrable skills for many other sectors.

5.2. Rural Tourism Case Studies

Rural tourism differs from industrial heritage tourism in that it covers not just sites used as tourist attractions, but the entire span of the tourism phenomenon – from accommodation through food and drink to sites and the wider culture of a heritage region. And yet rural tourism can have very low capital investment demands compared to industrial heritage tourism. Occasionally rural tourism forms a hybrid with industrial heritage tourism – a theme discussed in the railway studies earlier in this report and covered in the Haslach, Austria study (5.3) at the end of this section.

Rural tourism has pioneered a range of innovative ideas. It has seen the notion of establishing a rural area's Carrying Capacity for tourism overtaken by Limits of Acceptable Change. It has worked on the ideas of local tourism development groups, local and regional sustainable tourism strategies, trails, rural festivals, nature and ecotourism and many other discussions and techniques. And it has moved on to the concept of second generation rural tourism as a possible way forward to beat off competition from other types of destination. It is an ideas-rich subject. But it suffers from fragmentation, from being a grouping of thousands of micro businesses. Within rural tourism, agri-tourism plays a strong role in farm diversification and heritage landscape conservation. Farm tourism is closely involved in a new, fast growing, tourism area - food tourism. A case study from Denmark can be found in Annex G, G5.

Rural tourism has also developed a range of local development groups, and series of national agri/rural tourism marketing organizations. One of these organizations, Austrian Farm Holidays, is featured here (5.2.4). Further examples, from Latvia and Slovenia, are located in Annex G, G6.

Accommodation (5.2.1) is a central theme of all rural tourism – offering strong opportunities for economic gain, for conserving historic buildings as well as "green" new building. Accommodation has more enterprises than any other part of rural tourism: accommodation is part of the rural tourism product because rural accommodation is so different to resort accommodation. It also attracts a special type of rural tourism business – the life style entrepreneur. Information on both those activities is given in Annex G, of this study, along with an example of food based Rural Tourism development.

Rural tourism is very much an area rather than a single site activity, a theme taken up in the Portuguese study, (5.2.2) which brings together village, small town and community tourism development issues. Protected Areas will be discussed because they illustrate intensive rural tourism activities, potential governance and management regimes, special opportunities *and* dilemmas, with a series of contested issues to understand (5.2.3). Finally, (5.3) a short study shows how in some cases, rural and industrial heritage tourism can come together to mutual benefit.

5.2.1. Rural Accommodation

Accommodation is perhaps the most essential ingredient in the rural tourism equation. Overnight visitors are valuable. Surveys show that overnight visitors have higher spending levels than day visitors, typically up to 300% more than day visitors. Investigations also show that more of the expenditure on accommodation in rural areas is retained in the local economy than other tourism spending. Up to 70% of accommodation expenditure remains in the community compared to 20% of retail expenditure. In addition, tourist expenditure on accommodation is a greater generator of jobs for a given capital expenditure than retailing, restaurants or attraction developments (PA Cambridge Economic Consultants, 1990). Rural accommodation is almost always locally owned. Externally owned chains of hotels are relatively rare. Accommodation helps create a recognised destination. It can open the way to the formation of local tourism associations, training, better marketing etc. A number of researchers have shown that small and very individual accommodation opportunities are a Unique Selling Point for many visitors, differentiating the rural tourism product. Personal contact is regularly reported to be a key reason why many guests choose rural holidays (English Tourist Board, 1987). The importance of accommodation provision explains why rural tourism has a much greater economic impact than industrial heritage tourism.

Accommodation statistics show the full extent of seasonality in rural tourism, and the large amount of spare capacity in the sector. Many less sophisticated enterprises, and many remote enterprises, have bed occupancy levels as low as 30%. But others surpass the typical national urban and rural average hotel occupancy levels of around 65%. Some unserviced accommodation providers can exceed 80% occupancy. There are many reasons for these variations. Seasonality is one of them, but although a complex problem, it often be improved by market knowledge, pricing policies, product development and skilled marketing.

The full and complex picture of rural accommodation is given in Annex G, G3: an outline of its variety is given below. It uses a simple two fold division – unserviced – providing sleeping accommodation only - and serviced supplying sleeping accommodation, meals, personal attention and service. It is important to note that rural accommodation provides much more unserviced accommodation than do cities or resorts.

Unserviced accommodation provision

- Campsites – including glamping and other upmarket provision

- Caravan/recreational vehicle sites

- Camping barns/stone tents

- Hay/straw barns/"Sleep in the Hay"

- Self-catering accommodation – new build

- Self-catering accommodation – conversions

- Speciality self-catering: typically using high quality heritage buildings

- Timeshare

Serviced accommodation provision

- Bed and breakfast

- Farmhouse bed and breakfast

- Hostels/group accommodation

- Guest houses

- Hotels

Sustainability should be part of all rural tourism's activities: accommodation is no exception. Increased use of re-cycling and environmentally friendly building and business techniques should be incorporated into all rural accommodation types. The major hotel chains are already far ahead in this area[48]. The classic example of environmentally friendly rural accommodation provision is the Hotel Ucliva in Waltensburg, Graubunden, Switzerland. This 70 bed hotel dating from 1983 (but with later extensions) is built of energy efficient, environmentally friendly materials, specialises in locally purchased, organic/semi-organic home cooked food, offers a range of low impact activities for guests and has exemplary employment and local involvement policies[49].

5.2.2.   A Rural Region Approach

The Schist Village Network in Portugal

The advantages for rural tourism of working in partnerships of various kinds are now widely recognised but rarely fully implemented. Rural tourism offers a complete tourism experience, including accommodation, attractions and activities and food and beverages. Partnerships can bring all those enterprises together, and use economies of scale to promote, market and help develop a rural region approach. They are not, however, easy to create, to energise, to maintain or to use. This study of two networks in Portugal is a long one. That length is justified because the need to work with local people in rural areas is very great, but the complexities in making such arrangements work are considerable and need to be explained.

The study shows the strengths and weaknesses of partnership approaches to sustainable rural tourism development. Annex C elaborates on those strengths and weaknesses in Tables 8 and 9. This study also shows the problems associated with the bureaucratic constraints imposed on rural development in Portugal. It illustrates the dangers of rival projects. Like most of these projects, however, their evaluation and detailed reporting could be improved.

The material for this section comes largely from the work of a three year rural tourism research project led by the University of Aveiro in collaboration with UTAD (University of Tras-os-Montes and Alto Douro). The ORTE Project, entitled "The **O**verall **R**ural **T**ourism **E**xperience and sustainable local community development", began in 2010 and will end in 2013. This innovative and comprehensive research project is financed by the Portuguese

---

[48]   See Bohdanowicz, 2011.
[49]   See www.ucliva.ch

_____

Fundação para a Ciência e Tecnologia, and co-financed by COMPETE, NSRF and ERDF. Further information is available on: http://cms.ua.pt/orte/?q=node/20.

The Schist Villages Network Program (SVN) was created in 2000 in Portugal's Centro region, in the context of the EU's Community Support Framework 2000-2006[50]. It takes its name from the local geology: schist is a metamorphic rock, with minerals such as mica, quartzite and hornblende. It is widely used in traditional building in the Schist villages, giving distinctive streetscapes. SVN is a sustainable regional development project, developed from an initial partnership of 16 municipalities. It now comprises 27 villages, 19 municipalities and over 100 operators with tourism related businesses in this territory. In 2011 the 19 municipalities had a population of 281,448 people, across 6,555 square km.

The program was created initially through the elaboration of "Village Plans", assisted by a specialised and multi-disciplinary team working with each community. The Village Plan is a working document based on an in-depth study of each village, its surroundings and its population. From this study, essential actions were defined to promote the development of their territory. While this case study concentrates on rural tourism, the overall purpose of the programme was, and is, to assist the region's overall social and economic development.

Within the plans, the development of village inventories of both relevant tangible and intangible heritage were the keys to developing ideas about possible tourism experiences, and how to turn that heritage into tourism products. The Program launched ADXTUR - *Agência para o Desenvolvimento Turístico das Aldeias do Xisto* (Agency for Tourism Development in the Schist Villages), as an entity that could then promote and market the actions developed in the context of the Program. ADXTUR is a non-profit private association that brings together both public and private forces for the promotional purposes, the creation of wealth through tourism and the preservation of the heritage of the rural communities and their environment[51]. ADXTUR has a staff of 5 employees and 7 contractors for consulting and other services. The overall programme aims, while developing tourism, to reduce the many common development problems of the inland villages of rural Portugal, including ageing populations, depopulation, isolation, fragmented/small scale productive capacity, lack of information and poor accessibility.

To gain the trust of local people through meeting with them and creating a community network building process. Each village set up community meetings, ADXTUR staff explained the project, worked closely with municipal staff and specialists from the regional coordination commission CCDR-C, the Coordination Commission for the Development of the Centre Region, who regularly met with the owners of historic buildings to explain how they could be restored and what could happen in the entire village. ADXTUR not only promoted visits by professionals to the villages, but also visits by people from some villages to other villages to gain awareness of the network and understand their similarities, differences, common problems and possible solutions. A special magazine was developed, dedicated to those involved in the project, passing on the message and illustrating the strengths and achievements of the Schist Villages.

The programme is holistic, not just involved with tourism marketing and development programmes: it emphasises the conservation of local architectural styles and techniques, job creation, local pride, heritage conservation and retaining authenticity. To assist this, an international project was set up linking the SVN with the Røros Museum and the UNESCO

---

[50]   http://www.qca.pt/english/home/index.asp.
[51]   http://www.aldeiasdoxisto.pt – available in English and Portuguese).

World Heritage Site at Røros, in Norway. This – grant aided by European Economic Area - Norway funds – has assisted the painstaking conservation and re-use of 80 traditional houses in several villages, and trained new craftspeople in heritage repair using authentic methods and materials.

A key outcome has been the creation of the Schist Village's stores, selling local products, and offering tourist information, to reduce one of the biggest problems in this region – the producer's micro scale and lack of access to major distribution channels. The villages have a rich handicraft tradition, know-how associated with those crafts that reflect the culture and tradition of the region, but had previously no expression or economic dimension for that tradition. ADXTUR helped overcome this problem by creating their own network of stores, permitting the sales of local craft production, an economic return for the artisans that helps maintain tradition and provide a case for active people to stay in the villages. The Schist Village Network's 12 stores sell food, publications and handicraft products, sometimes associating traditional arts with modern design; they are located in the villages and also in Lisbon, Barcelona and Coimbra, with the last three creating a tangible form of synergy marketing between tourism and urban craft sales.

ADXTUR has also promoted the development of several other initiatives, for example: a magazine sold to tourists and the general public; a book with traditional cooking recipes (*Carta Gastronómica*), beautifully illustrated and linked to specific local people; a calendar of events; the promotion of products/ services associated with the territory's heritage, for example, routes – Schist Walking and Mountain Bike Trails - and a set of Theme Houses, related to traditional skills (The Weavers' House, The Mushroom House, The "Drum's" House and The Honey House), that now are fostered by another local development association – Pinus Verde (an association focused on forest management, working with the concept of multiple uses and integrated development of the forest). Additionally, all the marketing of the SVN (for example, the marketing strategy, the internet site, brochures, a magazine, participation in national and international trade fairs) is designed and promoted by ADXTUR.

The Schist Villages' three Mountain Bike Centres are permanent structures, each with a network of signed trails for mountain bikes, creating fully equipped hubs with information, car parking, showers and a bike self service station, with washing, air and small bike repair station. Each Centre offers Cross Country, Down Hill and Free Ride trails, with four levels of difficulty, thus being suitable for all grades of riders, from beginners to experienced bikers.

Marketing is done via the Internet and via close contact with inbound tour operators and attendance at tourism trade fairs including Berlin's ITB. The Web site brings together 70 accommodation providers and 6 camp sites. Market research is currently in an initial phase: partners (shops, accommodation, restaurants) may be asked in the future to use surveys to identify customer socio-economic profiles and tourist motivations. A new scheme of quality grading has been developed for the area.

ADXTUR's budget comes in part from an annual membership fee from local businesses and organisations, ranging from 10€ to 500€, depending on the type of activity). ADXTUR has also received €11,956,561 from the European Community Support Framework III (through ERDF) to investments in public spaces and infrastructures (public infrastructures and facades of private houses). Currently, the National Strategic Reference Framework (in the context of PROVERE, ERDF, & PRODER) strongly supports activities, with more than €9,884,027 of EU financial aid allocated within the territory, since 2009. Funding is a problem because of the short term and volatile nature of some financial sources, making

implementation of action programmes difficult. ADXTUR is, however, regarded as a permanent organization, rather than a short term project.

ADXTUR is governed by democratic decision-making and a bottom-up approach, with the participation and full involvement of all active partnership members, (public, private and non-profit) who articulate their interests, assume obligations and negotiate their differences, based on participation, transparency and accountability. To achieve this goal, the management of the Association is integrated with the Villages' Council – a body with representatives from all the villages, its own administration, independent of the Association and of other institutions that are involved in the Schist Villages. The Council, with leaders of each village meet on a regular basis, independently of ADXTUR's agenda.

ADXTUR's strategy, while focusing on tourism, is very much an instrument of regional and local development, improving the local economy and social development through the following elements:

- a strong social component, genuinely reflecting the living conditions in the area;

- the natural heritage, its management, qualification and protection, recognising natural heritage as a comparative advantages of this area;

- the built heritage, specifically the architecture of the schist buildings, characteristic of this area, which forms the essence of the Schist Villages brand;

- local products, handicraft or agri-food products, which are seen as authentic, originally related with everyday life, containing traditional knowledge that is seen as a valuable and unique cultural dimension in the face of the demands of modern life.

ADXTUR puts special value on integrating the creative industries and innovation, both for commercial reasons (especially in the shops), but also in terms of research and rural development, with the ambition of making the territory an experimental laboratory for rural development anchored in tourism.

Has ADXTUR solved the problems of the region? A number of problems have been reported to Project ORTE's researchers:

- Not all villages have an effectively integrated and appealing tourism product.

- Village de-population remains a problem.

- It can be difficult to create a critical mass of players in each village.

- Above all, a number of businesses report excessive bureaucracy and difficulty in gathering clear and simple information about the requirements for tourism investments, and great problems in obtaining the many licenses necessary to set up and conduct tourism businesses, with delays from government offices of, in some cases, years, not weeks.

The "Historic Villages of Portugal" Network (HVPN) was initiated in 1991 in the context of the EU II Community Support Framework and extended under the III Community Support Framework. It was a publically funded program to reclassify 12 villages of Portugal's Centro region. Several organizations participated, including the IPPAR (Portuguese Institute of Architectural Heritage), the Coordination Commission for the Development of the Centre Region (CCDR-C), local authorities and some private entities. This program aimed to mitigate the problems associated with remoteness/ marginality, such as population aging, desertification, weak productive capacity and lack of entrepreneurship in the region, all of which compromise the development of the local and regional economy. It also aimed to valorise and restore the historic built heritage of the villages. Interventions, supported by the European Regional Development Fund (ERDF), between 1994-1999 and 2000-2008, amounted to €44.6 million. It appears that, compared with SVN, and based on local discussions, that this Program was not fully successful. The branding does attract tourists, but the villages have not developed enough things for tourists to do and tourism related incomes remain low. The practical effects of the HVPN were mainly related to restoration of facades and buildings and the creation of the brand "Historic Villages of Portugal". The group is featured on an English and Portuguese web site[52].

Even though there are municipalities that integrate both HVPN and SVN, (the Schist Village Network), there is no formal cooperation between these two networks. This duplication seems strange, and might be a lost opportunity. SVN appears to be the more successful organization, probably because of its holistic activities, and stronger links with tourism, job creation and marketing.

5.2.3.   Rural Tourism and Protected Areas / National Parks

This section has been included because of the strong role of protected areas in general, and National Parks in particular, in the distribution and growth of rural tourism, and in its potential future governance.

About 21% of the area of the 32 member states of the European Environment Agency is in rural protected areas. Much of the land involved is in National Parks. There are six basic categories (I-VI) of protected areas classified worldwide by the International Union for the Conservation of Nature[53]. Of those categories, Category IA and IB are very strictly managed and effectively not accessible to tourists. Category II protected areas, National Parks, are the major protected areas that are of interest to, and accessible to, tourism.

"*Category II protected areas are large natural or near natural areas set aside to protect large-scale ecological processes, along with the complement of species and ecosystems characteristic of the area, which also provide a foundation for environmentally and culturally compatible, spiritual, scientific, educational, recreational, and visitor opportunities.*" [54]

National Parks, because of their scenery, and their brand name, are areas of intense tourism demand, and intense rural tourism activity. UK statistics show that the percentage of tourism related business and employment in National Parks is double that of rural

---

[52]   http://www.aldeiashistoricasdeportugal.com/ and on http://www.visitcentro.com/en/destinations/historical-villages/accommodation/.
[53]   www.iucn.org.
[54]   Dudley, N. (ed.) (2008) Guidelines for Appling Protected Areas Management Categories. Gland, IUCN, p.8.

_____

England as a whole: in National Parks 27.5% of businesses and 21.2% of rural employment are tourism related[55]. Similar figures have been reported for other parts of Europe, although there are variations between parks, and in how the statistics are presented in each study (Getzner et al, 2010; Getzner, 2010a; Mayer et al, 2010). Mayer et al, comparing visitor expenditure across six German National Parks, found that overnight visitor expenditures varied between the parks from €37 to €57 per person, while the national average overnight visitor expenditure in German as a whole was €120.

Secondly, National Parks have much more sophisticated governance and planning systems than other rural areas. As governance systems are important for encouraging improved performance from rural tourism, national park tourism governance systems may hold important keys to future progress.

Thirdly, there have been on-going and radical changes in the relationship between National Parks and rural tourism over the last 20 years. Tourism was seen as a danger to the protected area status of National Parks, encouraging questionable social and cultural change, and bringing environmental damage. New sustainable tourism management and marketing techniques have reduced the environmental threat. Well managed tourism is now seen as a valuable aid to conserving rural societies, which might otherwise lose economic viability. Many national park environments rely on a viable tourism industry to help support and maintain agricultural systems that in turn help maintain ecosystems and landscapes. And even National Park administrations increasingly find financial contributions from tourism, plus its political support, essential for the maintenance of their planning systems (Eagles, 2002). National Parks are also widely studied, providing large potential amounts of research based data on which to base development and management decisions.

This section, therefore, examines two western European National Parks and their governance systems and two central/eastern European National Parks to better understand the interplay between national parks and rural tourism. This process begins with an EU and Norwegian Research Council jointly financed comparison of Jostdalsbreen National Park in Norway, and the Hohe Tauern National Park in Austria (see Getzner et al, in press). It discusses a new concept National Park currently in formation in Transylvania, Romania, and closes with a review of the Polish part of the Białowieża National Park which straddles the border between Poland and Bielorussia. Low pressure, high pressure, experimental and transitional management approaches are illustrated.

Jostdalsbreen National Park, Norway

Jostedalsbreen National Park, established in 1991, covers an area of 1,310 km², much of which consists of the Jostedalsbreen glacier, the largest in continental Europe. The main management objective is nature conservation, although the park is one of several in Norway adapted for tourism purposes. Tourist numbers are rising slowly and are currently around 500,000 per year. There are currently few other serious management issues. In 2009, 11 small enterprises offered tourism activities, such as walks, climbs, and ski tours, to around 20,000 tourists. Most tourists were day visitors from outside the area, a large number from international cruise ships on the Sogne Fjord.

The management of Jostedalsbreen national park is a 'traditional' Norwegian model. National authorities hold management responsibility, while the regional County Governor's office is the executive body. The county government is a decentralized office of the national

_____

[55]   http://www.defra.gov.uk/statistics/rural/the-rural-economy/rural-tourism/.

authorities; a National Park Manager is employed at the county's environmental department. He/she is executive officer for several protected areas (PAs), and on average 30% of his/her time is dedicated to Jostedalsbreen National Park. In addition, there is a nature inspector connected to the park employed by the national Directorate for Nature Management: the inspector is based locally and is also responsible for several smaller PAs. Approximately 90% of the inspector's time is used on Jostedalsbreen NP. Three national park information centres are partly funded by the national authorities. Compared to international standards, the management model for Jostedalsbreen national park may be characterized as a low-cost, low input, low-output approach, with only 1.2 permanent positions dedicated to the direct management of the area. Another central characteristic of the Norwegian management model is its decentralization (and fragmentation) with several separate bodies responsible for particular management tasks. Total staff including visitor centres and national authorities' administration amount to eight all-year positions and 25-30 seasonal workers. The national park management is responsible for conservation and information. Tasks such as destination marketing and regional tourism management are outside the national park's remit. Participation and stakeholder involvement is carried out informally, based on personal contacts, and local discussion with elected representatives, staff and interested parties. The system functions because there are few conflicts, and relatively little pressure for change. The precautionary principle is maintained: there is little involvement in developing regional economic viability.

Hohe Tauern National Park, Austria

Hohe Tauern National Park, established in 1983, covers 1,834 km² of Alpine forests, grasslands, glaciers and rock formations. It is the largest national park in the Alps and has been a destination since the 19th century. Visitor numbers are estimated at 2 million per year. The park is established by federal legislation in three different federal states (Carinthia, Salzburg, and Tirol; political representatives from each federal state and the Austrian Minister of the Environment form the "national park council", an overall steering committee for the park, with local politicians, NGOs and landowners on several park boards. The park has 80 permanent staff members and about 20-40 seasonal employees and volunteers. They have responsibilities for conservation, environmental education, park interpretation, research and communication and, to some extent, regional management. In the Carinthian part of the park, park management is also the organizing body of tourism and destination management, including marketing. The new Tauernwelt visitor centre – one of 30 centres of various sizes - attracts over 100,000 guests each year.

Participation and stakeholder involvement is carried out through a range of formally constituted stakeholder boards, mostly with a range of associated committees. The park has close links with several councils at parish and regional levels, their elected representatives, and makes extensive use of the media including its own newsletters and website. The system is complex, and intensive, because there are strong development pressures. The Park is very actively involved in tourism and takes the view that positive but conservation based involvement is essential to maintain the triple bottom line of sustainable development. There are numerous partnerships between businesses, communities and the Park. Its management model may be characterized as a high-cost, high–input, high output approach. The precautionary principle is maintained but in a strongly evolutionary and innovative way: the Park is a key player in maintaining regional economic viability (Getzner, 2010b).

Transylvania, Romania

Romania has 13 National Parks, largely controlled by the National Forest Authority. Many date back to the 1930s. They have serious problems because of development pressures, underfunding, and the relatively slow development of conservation based, sustainable development attitudes at many – but not all – levels of Romanian society. The question of land restitution and the dismantling of the state's nationalization of land under communism add to the problems.

Given this background, a radical new idea in National Park creation, conservation and rural tourism was launched in 2007 by a group of Romanian and international biologists, conservationists and philanthropists to create a private National Park with an ultimate size of 50,000 hectares. Foundation Conservation Carpathia draws on the experience of similar projects in North and South America, and in Africa. It currently owns 12,000 hectares of forest and grassland, with 10,000 more in negotiation. The eventual cost of land purchases could be €130 million. The park aims to restore the natural ecosystems of the Carpathians, for the benefit of biodiversity conservation and local communities, and be large enough to maintain Europe's last remaining major group of Large Carnivores – a process begun by the World Wildlife Fund's Large Carnivore Project in 1992. The landholdings which form the nucleus of this embryo park are adjacent to the Piatra Craiului National Park, in the Brasov region.

The driving force behind this project is the conservation of wilderness and its wildlife; it believes that ownership is the only safe way towards that goal. This ownership, however, intends to be that of an enlightened despot: the promoters plan to involve nearby communities in employment opportunities, and develop a new style of wilderness tourism – one that will learn from the research of Higham (1998) into wilderness experiences, and probe new ideas, for example, using GPS rather than signposts and created trails to take visitors into the Park. It will extend local links between tourists and communities, drawing on the experiences of the Large Carnivore Project 1992-2002. This system places a premium on the precautionary principle, but also aims to create a sustainable rural economy, drawing on best practice worldwide.

The concept of a privately owned and managed park is a new one for Europe. It has historic links with the great estates of much of pre-twentieth century Europe. It also has possible links to the privatization movements across many European economies.

The Białowieza National Park, Poland

This case study illustrates the way in which, in the newer EU member countries, protected area administrations are changing their approaches to tourism, and taking account of new political, social and economic demands and opportunities[56]. Białowieża National Park is an example of a slowly evolving and modernizing park, with few environmental pressures, and some links to regional economic development. Its management model is a medium-cost, medium input, medium output approach.

---

[56] This section is based on the work of Dr Janusz Majewski, of the University of Life Sciences in Poznan, who has worked on rural tourism development with communities and stakeholders in the area for many years, having earlier been the national Rural Tourism Brand Manager for Poland. In addition it draws on in-depth discussions specially commissioned with key local stakeholders.

The Białowieza Forest is located approximately 230 km east of Warsaw, a 3 hour road journey. It covers an area of 150,000 hectares and straddles the border between Poland and Belarus. Its western part (in Poland) comprises 62,500 hectares, of which 10,500 constitute the Polish Białowieza National Park. Another 8,000 hectares enjoys other forms of protection, and there are 21 special reserves. Trees over 100 years old are not cut. The Polish part of the Białowieza Forest is administered by the Podlaskie voivodship, and Hajnówka County. The population density of the Polish part of the Białowieza Forest is around 7 people per square km, one of the lowest in Poland.

Bialowieza is the oldest Polish national park. In 1932 an existing forest reserve became the "National Park in Białowieza". In 1977 the Białowieza National Park became a UNESCO Biosphere Reserve, and in 1979 a UNESCO World Heritage site. The site, shared with Belarus, protects part of the largest surviving area of European primeval lowland mixed forest: pine, beech, oak, alder and spruce. Its rich fauna includes 50 species of mammals, 120 species of breeding birds and about 10,000 species of invertebrates. Iconic species include the tarpan (Polish wild forest horse), elk, stag, roe deer, wild boar, lynx, wolf, fox, marten, badger, otter, ermine and beaver. The European bison was reintroduced into the park in 1929.

In 1997 the park received the Diploma of Europe. Its most fragile area is a strict nature reserve, visitable only with a licensed guide. Other parts of the forest have marked trails and nature paths, and may be visited without a guide. The Bison Display and Breeding Centre presents the Bison, Tarpan type horses (Konics) and hybrids of bison and domestic cattle called Zhubron. There is an Environmental Education Centre, a modern Forest and Nature Museum, and a small number of Tourist Information Points[57].

The Local Economy

Before 1989 the economy was based on the timber industry, forestry, agriculture and food production. Since 1989, the machinery sector has grown, along with services and rural tourism. There are now 72 registered tourism businesses, plus a number of accommodation providers with fewer than 6 rooms.

Tourism to Bialowieza Forest before 1989 was mainly educational tourism for organized school groups and for adults who travelled by coach. The only tour operator was the state owned PTTK (Polish Tourism Association). After 1989, the private sector grew, a number of local small tour operators and some external tour operators started work. Special interest tourism such as bird-watching and nature tourism has become important.

The role of the National Park in tourism

The National Park authority is responsible for tourism infrastructure in its area; the Forest authority is responsible for its own territory. The Hajnowka County authority is responsible for the rest of the territory and coordinates forest wide projects including working with NGOs. In 2011 Hajnowka County announced a tender for a common tourism infrastructure improvement project for the whole area (Park, Forest and the rest). It includes modernization of trails, building a new information system, viewing towers and an animal garden with bison; 99% of the area's bison roam freely.

---

[57]   More information is available (in Polish and English) at www.bpn.com.pl.

The National Park established a tourism administration department in 2011. It licenses around 100 local guides, the only people permitted to conduct tourists in the National Park. It maintains tourist trails for walkers and cyclists through the Forest including educational paths and 5 viewing towers. Visits to the main visitor centre have risen from 67,220 in 2002 to 84,277 in 2011. The park liaises with a number of key stakeholders including the Bialowieza Rural Tourism Association "Zubr", the Rural Tourism Association "Bialowieza Forest" in Narew, an Association of Local Products Providers, and the Local Action Group Leader+.

Tourism policies

The county of Hajnowka produced a Strategy for Tourism Development in 1999, followed by a Strategy for Sustainable Development with a special chapter on tourism. There are some Local Operational Plans. There is a Local Strategy for Local Action Group (Leader+) for 2009-2015. The first steps towards establishing a Destination Management Organization were taken in 2001; it is hoped to move towards that idea in 2013. The informal policy sector has seen the most interesting changes: the national park has increasingly seen the value of tourism, and begun to learn to manage rather than simply restricting it. National park staff, the industry and county staff are beginning to work more closely together. The national park has sought to expand its boundaries but this has met with local opposition.

Accommodation

There is a growing supply of tourist accommodation in the Forest, especially just outside the Park boundary in Bialowieza Village, the main centre of tourism. In 2002 there were 28 registered rural tourism units with 270 beds: by 2011 there were 1,200 beds in 71 units. Including hotels, 3,000 beds are now available in the whole county of Hajnowka ranging from camp sites, hostels, and rooms/apartments for rent to guest houses and hotels including a 250-bed 4-star hotel with conference facilities.

External public sector funding has been very important is financing accommodation development. The 1999-2003 Danish DANCEE small grants programme gave around €1 million to the area, of which 20% was for tourism, increasing rural tourism accommodation units from 29 to 71, and bed numbers from 280 to 536. In terms of overall rural development, EU funds have included: LEADER+ (since 2007) €500,000; INTERREG - (2006-2008) €407,000; Cross-border – (2006) €76,000; Open Forest – (2003) €14,000.

What does the area need to develop rural tourism further?

- Better collaboration and coordination between stakeholders and key players: the case for an integrated Destination Management Organization was made in 2001, but is still not implemented.

- Better awareness amongst tourism providers about nature and culture resources and the tools of product development and interpretation, despite there having been some training courses and study tours.

- Recognition of the cultural heritage significance of its wooden architecture, which currently does not receive enough protection, interpretation or marketing.

- Funds for developing tourism infrastructure and promotion (Hajnowka County is the most popular destination in the Podlasie region but is not recognized at regional level).

- Market research and a marketing strategy based on that research.

- A modern system of tourist information.

- Measures to reduce migration of young people; the average villager is 55 years old.

- Measures to retain the traditional architecture and special rural ambience of Bialowieza.

- Creating a number of integrated tourism products with professional promotion and distribution. Brand development linked to tourism products.

- Better dispersal of tourists by creating a second gateway to the National Park, reducing stress on Bialowieza village.

- Stronger involvement of local authorities in tourism.

- An independent structure for tourism management based more on the industry than the public sector, linking tourism and local products.

5.2.4.   National Agri-Tourism and Rural Tourism Groups

This section discusses national Agri and Rural Tourism groups. Such groups formed in most European countries over the last 20 years to provide marketing, development and lobby networks, and are important to, and characteristic of, the sector. They have a range of common features. Where agricultural ministries are financial participants, their finances tend to be stronger, but membership is limited to working farms. They all seek to overcome the marketing problems faced by small enterprises. They all have websites – though some are much better than others. All still have printed publicity, although that is a declining activity. The majority offer some training and advice, and see their work as part of a wider endeavour to conserve and sustain a traditional countryside. All face rapidly growing competition from low cost international accommodation marketing websites, which do not offer advice, training or development, but are cheap. All have a turnover of members each year, as some retire, give up taking guests, or seek to save money by resigning their membership: most get some new members every year as new enterprises start up. Because of competition from local Internet sites and from international sites, the future of weaker groups is now very unsure.

The Austrian Farm Holiday group is featured because it is the leading group of its type worldwide. Further case studies covering can be found in an Annex G, G6, at the end of this report. Latvia and Slovenia are featured there because they are amongst the best of the groups in the new EU countries.

Austrian Farm Holidays / Urlaub am Bauernhof

Austrian Farm Holidays is, without doubt, the most effective, the most innovative, and the best funded, farm holiday/agri-tourism marketing and development group in Europe,

_____

perhaps worldwide. It was founded in 1991 to consolidate a number of regional groups, one dating back to 1971. The consolidation created a more professional and powerful national organization. It was, and still is, supported in part by the Ministry of Agriculture and the Ministry of Economy, Family and Youth: the latter Ministry is responsible for Tourism Policy in Austria. It aims to support farm based tourism enterprises, support agricultural areas and to create attractive vacations. It is important to note the high rate of enterprise contraction in Austrian agriculture, with 13 farms closing every day.

Austrian Farm Holidays is a highly professional, well-funded, and very effective marketing and development organization. Most other national rural tourism organizations are less effective, in part because of financial problems. While the Austrian model cannot be replicated exactly elsewhere, many aspects of its approach and systems could be used in other countries, but require financial inputs and highly skilled staff.

Austrian Farm Holidays is a private association, effectively a non-profit. It employs 22 full time equivalents. Governance is by a President and four board members, who are elected by representatives of the regional groups and key stakeholders.

The organization is funded in part by the two ministries (50%) and in part (50%) by its 2,750 members, who pay a basic fee with additional charges for specific marketing services chosen. Basic fees are currently €35 per bed per year (+VAT), plus extra fees according to the brochures that members choose to be featured in. Total income is €1.25 million; €842,000 of that sum is spent on marketing and related projects.

Austrian Farm Holidays' members have around 36,000 beds, approximately 1 in 7 of all guest beds in Austria. There are 2 million users of farm holidays each year, with a total gross spend of €1-1.2 billion. Approximately 50% of bookings are repeat business.

Austrian Farm Holidays provide a very full range of services including:

- Two web sites[58], plus a range of social media and Web 2 activities;

- A regional advice and discussion system, as well as a national organization;

- Quarterly newsletters and statistics about individual members' performance;

- Representation at trade and tourism fairs in Austria, Czech Republic, Hungary, the Netherlands and Germany;

- Market Research;

- Media work, including press and TV, including editorial and paid spots on prime-time TV, and for 2012, two named express trains running between Vienna and Bregenz, and between Salzburg and Klagenfurt;

- Joint marketing with other organizations, and event sponsorship;

- Training courses held in conjunction with Chambers of Agriculture;

- Lobbying government;

- A range of specialist holidays and brochures including farm holidays for babies and children, for horse riders, on organic farms, and for those with special access needs.

---

[58]   www.urlaubambauernhof.com / www.farmholidays.com.

Austrian Farm Holidays is unique amongst organizations of its type because it publishes performance figures which show how members' bed occupancy rates are changing – on average up 20% over the last 20 years, and the price they obtain per bed – which is up 120%, twice the rates of inflation over the same period. And while concentrating on marketing, it is important to stress its work on product development, staff/owner training, quality improvement, and its background role of maintaining rural community life and business.

In 2011, Austrian Farm Holidays published its *Strategy for 2011-2020*, the product of intensive market research and consultation processes with its members. The Strategy revealed to members a range of ways that they themselves could improve their own businesses, introduced them to a range of issues and trends in the holiday market and explained how their association would change to remain highly effective[59].

5.2.5. Organic farming and its links to rural tourism

In a number of European countries, efforts have been made to link organic farming to a special type of environmentally friendly rural tourism. At a European level, ECEAT – the European Centre for Ecological and Agricultural Tourism[60], holds records of, and publicizes, a number of organic farms that offer organic accommodation and food. At a national level, Austrian Farm Holidays have for a long time produced special marketing materials for organic farm members. One key linkage is missing in Europe – there appears to be no organization marketing organic farm holidays to the buyers of organic food. That potentially two-way marketing synergy could pay dividends, and is used especially successfully in Korea (Choo & Jamal, 2009) and to some extent in Japan.

5.2.6. Second Generation Rural Tourism: A concept case study

In western Europe, rural tourism was a growth phenomena in the 1980s and 90s; eastern and central Europe followed a similar path through the 1990s to the present day (Lane, 2009). Development in both cases was market driven, by consumer demand, and by supply side changes resulting from agricultural diversification. Some development has been driven by short term rural development projects. The only effective coordination and guidance of this complex process has come from farm and rural tourism accommodation groups, with some input from some protected area administrations. None take a holistic approach, although some seek that ideal. Most of the accommodation groups now suffer from income problems for a variety of reasons.

The market driven approach has problems. Because of the small scale and fragmented nature of development, few stakeholders have the training to understand the long-term requirements of tourism. They are unable or unwilling to develop tourism infrastructure, and they have little access to market knowledge. Product development ideas exist, but are implemented by only a few areas/enterprises. Links to conservation, to rural regeneration, and to synergy with agriculture are all possible, but poorly developed. Networking, partnership and governance tend to be missed opportunities.

---

[59]   For further information see: Urlaub am Bauernhof (2011a) , Urlaub am Bauernhof (2011b).
[60]   www.eceat.org

More urgently, the agri-rural tourism sector now finds itself in a position of growing competition – in part from new rural tourism providers in low cost countries, in part from city based tourism and low cost chain hotels, and in part from cruise ship tourism. And – many of the first generation of rural tourism providers are now retiring from the field. Responses are needed if the economic and social benefits of tourism are not to be lost to rural areas, and if its environmental potential is to be maximised.

The concept of second generation rural tourism seeks to provide a series of blueprints to improve the situation described above, by developing branded rural tourism regions, created as partnerships between providers and stakeholders, increasing stakeholders' knowledge, using more effective marketing, and putting to use the ideas of slow tourism, food tourism, synergy with high margin agricultural production, and the use of tourism as a tool for rural regeneration, rather than just as an end in itself. A group of academic researchers is considering the creation of a "virtual" international rural tourism research group (Lane, 2012), in a bid to enable the professionalization of the sector. It would use the experience of the ALTER-Net model, a network of 26 partner institutes working on biodiversity policy issues from 18 European countries[61],[62], see Section 7.2.

5.3. A Mixed Rural and Industrial Heritage Tourism Case Study: Haslach, Austria

The small town of Haslach in Austria, 60 km north of the city of Linz, lies in a quiet rural region of Austria, near the Czech border, far from the busy tourist centres of the Alps. Once a thriving linen textile region, based on fast flowing rivers, quality water and local flax production, its many small scale rural and small town producers thrived into the post-war period, secure behind protectionist tariff policies. Competition from Czech producers across the border ceased when the Czech industry lost its way under Communist rule, but in the 1960s serious problems were encountered. The market for linen products declined as alternative low cost easy care textiles flooded the market. Many producers went out of business. The rural region around Haslach began to lose population, as farm jobs declined and young people moved to the cities. The opening of the border to the Czech Republic in 1990 allowed a rise in cheaper cloth imports.

This case study shows how industrial heritage and rural tourism can, in some cases, come together to offer two positive trends. Two local mills have transformed themselves into high class niche producers of quality textiles using a mix of contemporary and heritage designs. An additional small producer has specialised in heritage products. Secondly, in the 1990s a group of local people decided to maintain their textile heritage, and a textile future, by setting up a self-help group. A textile museum was created and, of greatest importance, an annual textile festival was set up which became internationally successful, in part because of help from the European Textile Network (ETN). Up to 20,000 visitors are attracted to the region each year by the festivals, many of whom stay overnight, thus boosting the income of a number of rural tourism accommodation providers. Important practical links were made with textile experts at the University of Linz. And some of the rural tourism attractions of the region were developed. Haslach and its rural area have a chance for the future.

---

[61] The institutes are: Alterra (NL), BC-CAS (CZ), CNRS (FR), CFS-CONECOFOR (IT), CSIC (ES), DCE (DK), DSE-UNIBUC (RO), ECNC (NL), ERCE (PL), IAES (EE), IEB-CER-HAS (HU), IFF (AT), IGB (DE), ILE-SAS (SK), INBO (BE), Irstea (FR), JHI (UK), NERC-CEH (UK), NINA (NO), PBL (NL), PIK (DE), SLU (SE), SYKE (FI), UBA (AT), UFZ (DE), VU-IVM (NL).
[62] See: http://www.alter-net.info/.

1. The venture was backed financially by both the local council, regional council, and by EU funding. All see the group's work as finding a new role for a town and its hinterland that had lost its way. That backing was financial, but also political, creating more confidence and an active cultural and tourism policy.

2. The venture marks out the region as one to visit for its tangible cultural identity. It differentiates Haslach from the many other historic small towns in Austria. It has high media value: the annual conference events get air time regionally and nationally. The festival brings in income and is held in the "shoulder" tourism season. Other activities – notably courses – are also successful. The tourism potential of the venture is backed by its excellent graphics and quality marketing. The textiles concept has been extended to include a sub-regional tourism area brand: Weberland (Weavers Land). The Weberland Trail takes walkers and bikers through the sites of the region. The town council's tourism officer is a leading member of the Self Help Group.

3. The Group has recently moved into a former mill building in Haslach which has been restored and fitted out with help from Regional Government and EU Regional Funds. It is used for a range of activities including educational groups, the headquarters of a company arranging training and work placements for people with learning difficulties, and a successful bar/restaurant. It is adjacent to the working mill which now concentrates on heritage products. The capital costs of the Textile Centre are carried by a partnership of the Town and Regional Council. They retain ownership, and on behalf of the community, benefit from the area's physical, economic and social regeneration.

4. The Heritage Products mill concentrates on felt products (felt slippers are a regional and Austrian speciality), and on traditional clothing and blankets. It has retail and mail-order facilities and is open to the public. It offers training to people with learning disabilities: this type of traditional manual work seems well suited to this group.

5. The Mill has developed an EU funded programme to help maintain specific regional sheep breeds in the area by purchasing the wool that regional breeds produce, sorting, cleaning and spinning it in house on a farm by farm basis, and then either returning it to its original farm for further processing, or selling on to craft workers or using it in-house in heritage products. Demand for this service and its products, has been strong. However:

   a. The Haslach experiment remains very dependent on public funding.

   b. Like so many industrial heritage centres, the town lacks accommodation facilities, hindering tourism growth, and textile heritage activities.

   c. The local tourism office is excellent, but has limited capacity to innovate.

Haslach is still served by a single track rail line, which provides a slow but scenic link to the city of Linz, though connecting to main line services requires the use of a tram link. There could be a case for bringing together rural tourism and industrial heritage tourism to create a Slow Tourism Destination, combining more pro-actively new developments in community rail, heritage interpretation, food tourism, cycle and walking tourism, with the industrial heritage interests of the area. This would be beyond the capacity of the local tourism office, but could be managed by an experimental Slow Tourism project (see 2.8), perhaps

_____

involving academic and other interests known to be working in this area in Austria, and there could be cross-border links with very similar geographies and communities in the neighbouring Czech Republic[63].

5.4.   Pan-European Organizations

This section reviews a number of the pan-European bodies specifically connected to industrial heritage and rural/agri tourism. Each has one major organisation which is pan-European; in addition, industrial heritage has a series of industry specific groups, two of which are outlined below, the European Textile Network and the Federation of European Museum and Tourist Railways. The highly fragmented nature of both industrial heritage and rural tourism makes both national and European partnership bodies potentially very valuable. As the market for both types of tourism product becomes increasingly trans-national, European co-operation becomes especially important, both in marketing and in product development terms.

All the pan-European organizations are very short of money, and cannot get money from their membership because they cannot offer members many services – because they are short of money. There is perhaps a circle of eventual failure here. Both the major organizations, ERIH and EuroGites, survive only because so of the dedication and interest of their CEOs. Yet all the pan-European organizations have potential; some have special potential. A series of key questions have to be asked and answered about their roles, and their best ways forward. To be effective, additional skilled staff, additional resources and effective networking would definitely be needed. The dividends in terms of economic, environmental and socio-cultural benefits could be great - but only if investment and change takes place.

The European Route of Industrial Heritage (ERIH)

This organization is the only group working to promote the conservation of Industrial Heritage, and its presentation to the public, across Europe. It brings together 77 key industrial heritage sites, "anchor points", across northern Europe, linked by a series of 12 international industry theme route and 16 regional routes. It has records of 3,000 specific industrial heritage sites. Its title comes from the Route of Industrial Heritage created by Germany's Ruhrgebiet, in 1999. The so-called 'Tour de Ruhr' of around 400 kilometres, covers key industrial heritage sites in "the world's largest open-air museum". The story began, however, 10 years earlier. In 1989 the State Government of North Rhine-Westphalia created a pioneering regional redevelopment plan entitled the "International Building Exhibition (IBA) at Emscher Park". It encouraged, by example, the ecological, economic, and urban revitalization of the industrial Ruhr Valley via a range of collaborative partnerships: see the earlier case study. In 1999, the successor plan to IBA – Project Ruhr – took over, and on a European level, ERIH was created.

ERIH was initially funded (2003-08) by an EU Interreg IIIB project. It is now funded by over 150 members, in 17 countries. Annual membership fees vary from €100 for individual through site and corporate fees to €500 for Anchor Points, producing €60-80,000 income per year.

- ERIH is credited with helping change attitudes to industrial heritage conservation and tourism across Europe, by bringing key people – academics, planners,

_____
[63]   See: www.textile-kultur-haslach.at; www.textiles-zentrum-haslach.at/textile-kultur-haslach/language/de.

architects and politicians - together to discuss, learn and implement new ideas. It has a regular newsletter, offers conferences, lobbies on behalf of industrial heritage tourism, organises expert exchanges, and carries out projects if and when it obtains funding.

- Its website[64] - has between 60-100,000 hits per month.

- Special attention is given to the new EU members, and especially on building links between Germany and Poland. On June 30th 2012, for example, a Night of Industrial Culture was held simultaneously in Upper Silesia, Poland, the Donbass in the Ukraine, and the Ruhr Area of Germany from 6:00 p.m. to 2:00 a.m.

The ERIH has several problems:

- Funding: Like many cross European organizations, it is extremely short of money. While project funding can be obtained from the EU, the application process is lengthy and entails considerable work with high risks of failure. Membership fees bring in little money: few members can afford higher fees.

- Time: Working across Europe is expensive and time consuming. Current funding levels allow for only one member of staff.

- Lack of tourism knowledge and interest: Membership is dominated by heritage conservation interests, with very little knowledge of tourism. ERIH would like to change that, but has too few resources.

- The need to tackle key undiscussed problem areas: These include access to industrial heritage sites for those with disabilities; work on developing programmes for a range of school curricula, work to harmonize building and other regulations.

The European Textile Network

The European Textile Network (ETN) was founded informally in Germany in 1989. Since 1993 it has been registered as a non-profit organization in Strasbourg. It emerged from a post 1960s growth in Artisan Textile production across Europe, a growing recognition of Europe as a textile culture region, and from the closure of many large scale production units. Initial funding came from the Council of Europe.

Members include textile artisans and artists, textile associations, museums and collections, designers, educators, schools, institutions and anyone interested in contemporary and heritage textiles. There are 400-450 members, from 40 European countries. Although "European", ETN also has members and partners worldwide, including Australia, Argentina, Canada and the USA. ETN makes special efforts to work with the "new" EU members. It publishes an extremely stylish and useful quarterly journal, "ETN Textile Forum", organises conferences and working groups - including one on Cultural Heritage and Museums. It aims to develop European co-operation, to strengthen regional identities and the idea of Europe[65]. It is a lively organisation; its conferences buzz with animated discussions, and fascinating presentations.

Membership costs from €55 per year. The total turnover is €30,000 per year.

---

[64]   www.erih.net.
[65]   See www.ETN-net.org.

_____

ETN ideas include:

- Textile linked industrial heritage is widespread across Europe. ETN wishes to conserve that heritage and see it used. Textilforum 3/94 sets out their main ideas.

- "In the interests of local producers, the preservation of the cultural textile heritage must urgently be updated", (p.24) … ETN proposes regional textile visitor centres, courses, and summer academies. Textile museums and centres are often members of ETN.

- ETN has completed 2 European Textile Routes, working with ERIH. It is interested in working with farmers who produce fibres: there are potential links to rural tourism (see Haslach case study at 5.3).

It follows, therefore, that ETN should have an interest in heritage tourism. Tourism skills could boost museum and centre visits. They could create local artisan producer trails to boost sales. There could be synergy between niche market tourism and niche market production. Yet ETN is not very interested in tourism. It does not see it as its business. This is in some ways understandable. But it exemplifies one of the reasons why some parts of the industrial and cultural heritage may be doomed. Given the likely lack of future public sector funding for textile cultural heritage, effective tourism links could be a valuable life line. Textile museums, centres and producers who understand the market and how to work with it could be the only survivors.

FEDECRAIL – the Federation of European Museum and Tourist Railways

The idea of a European federation of heritage railways emerged during celebrations for the 150th anniversary of Dutch Railways in 1989. FEDECRAIL was established in 1994 in Brussels, to monitor European legislation and seek amendments when they were likely to have an adverse impact on the industry and the Federation's members. This has now evolved into 5 key aims and objectives to:

- Promote the rescue, restoration and operation of Europe's railway heritage.

- Represent its members' interests with international agencies, in particular the European Commission and European Parliament.

- Encourage the exchange of ideas across national and cultural boundaries and foster co-operation between museums and tourist railways involved in railway heritage.

- Provide advice and assistance for museums and tourist railways involved in railway heritage.

- Study and share solutions to problems in restoring and operating heritage railways.

Membership is open to all European national organisations whose members are engaged in the preservation and operation of historic railways. Individuals or non-European national organisations can also join the federation as 'Friends of FEDECRAIL', but have no voting rights.

It currently has 16 national umbrella organisations as full members and 33 'Friends', which encompass 27 European countries. FEDECRAIL represents 640 heritage railways and railway museums across Europe[66]. The membership is predominantly from 'old' Europe; membership of the national organisations is generally higher in northern European and Scandinavian countries, probably reflecting the higher incidence of preserved industrial heritage in these countries.

Membership of most of the national member organisations has been stable over the last five years, with a small number seeing a modest increase.

Funding

The Federation is funded almost entirely from membership subscriptions which gives a turnover of only €25,000 per annum. The only other source of funding has been a small surplus generated by the annual conference and visit programme.
The Federation council, managing committee and technical representatives are all un-paid posts and are drawn from the membership of the national associations. A full-time officer would be helpful in promoting the industry, but the majority of the individual railways and museums rely largely on volunteers, and feel unable to support such a position.

Funding from mainstream banks is problematic; there is partial support from the public sector. Other funding opportunities are also limited, although in the UK heritage railways have limited access to the Heritage Lottery Fund. Until recently it was possible to get grants from the European Regional Development Fund. The European Cultural Fund has to date tended to ignore heritage projects in favour of the performing arts.

Tourism

FEDECRAIL has no specific tourism policy but they are very aware of the importance of tourism to many of their members. They endeavour to raise awareness of the value that their member's railways bring to local economies.

A number of railways are open all the year round but none on a daily basis, with winter openings usually restricted to weekends and school holidays, reflecting the general peak/off-peak season for most of the tourism industry (although this is changing). There is considerable variation in the level of joint activity with tourism boards, in part reflecting the national structure of these organisations, but also the size and available resources of the national umbrella organisations.

FEDECRAIL and some of its members are very interested in pursuing skills development, but there are insufficient funds to develop a number of promising proposals.

Lobbying

Since 1994, FEDECRAIL has lobbied for changes to 15 directives, all successfully, ranging from additional safety measures to restrictions on specific working practices. The group hope for closer links with the European Parliament's Transport and Tourism committee in this area. Some national organisations are also actively engaged in promoting the industry at national level. A study has been commissioned in France to gain a better insight into the value of the industry to local and national economies.

---

[66]   See Annex E for a breakdown of membership by country.

External issues

Heritage railways face many of the same issues as businesses or enterprises in other sectors. However, it is the introduction of restrictions that impact adversely on traditional methods of operation and conservation in particular that is likely to impact on their industry. In general they accept most rules and regulations as these for the most part are accepted by most industries.

Member services

It publishes a quarterly bulletin and organises annual conferences for members, which discuss current issues facing the industry. Some of the national umbrella organisations also provide a small number of membership services, for example the Heritage Railway Association in the UK holds seminars twice a year to up-date members on safety regulations etc.

Future needs

- Research is needed to find how best to extend the season

- Economic impact studies should demonstrate the value to local economies

- Funding for a full-time officer

- Better funding opportunities, including for skills development

EuroGites: The European Federation of Rural Tourism

During the European Year of Tourism in 1990, rural and farm tourism national organizations including those from France, Germany, Belgium, Italy, Portugal, and Iceland met to discuss the creation of a European umbrella body. The proposed organization would be able to lobby at European level, provide a potential European wide marketing platform, and become a forum for discussion, best practice and new ideas. EuroGites was formally registered in 1991 in Strasbourg. It is a non-profit organization, effectively owned and supported by its members, most of whom are also non-profits. Its prime supporter was Gites de France, then, as now, Europe's largest rural tourism organization, which provided office space and temporary staff. The EuroGites secretariat was based in Strasbourg, and its first President came from France. Following constitutional reorganization in 2002, the President (now named Secretary General) is based in Spain.

EuroGites currently has 35 national members across 28 countries. Continuity in work since 2002 has achieved:

- An English/French/German/Spanish language website[67], offering linked access to all its members' websites, and a range of publications and news items. That website has accumulated over 520,000 hits. It has a link to the website[68] of the European Travel Commission.

---

[67] www.Eurogites.org
[68] www.visitEurope.com

- Participation on behalf of its members in European level policy discussions, research projects, policy making forums, and formal advice structures to the Commission such as the Advisory Group on Rural Development (DG AGRI) or the TSG-Tourism Sustainability Group (DG ENTR).

- Strong and proactive involvement in the preparation and implementation of the 21 actions of the European Tourism Policy (COM (2010) 352) – participating in several ad-hoc working groups and focus groups.

- Five major European conferences ("European Congress on Rural Tourism"[69]), typically bringing 100+ international delegates and 200 local delegates together.

- A major Rural Tourism Quality Survey across a number of European countries in 2003-4 that resulted in the common European Assessment Criteria for Rural Tourism that were formally approved in 2005.

- These criteria and parameters were extended and updated in 2009-2010, in the context of a European-wide online quality assessment and training system for rural tourism[70].

- The registration of its logo as a European Trademark.

- Four-monthly market and business survey about the evolution of rural tourism in Europe, in parallel with the UNWTO Tourism Barometer.

- Networking between professionals in the rural tourism field, and discussions about problem solving and innovation both through EuroGites meetings and directly between EuroGites members.

- Cooperation with other European transnational organisations, either as member (ETAG, MER) or within specific projects (HOTREC, ECTAA).

Funding and Finance

EuroGites relies entirely on contributions - and sometimes support in kind - from its members. A basic annual fee of €400 is increased by additional payments of 40 Eurocents according each national body's member numbers, with total payments capped at €4,000. The total funds raised are just €19,000 per year (2011). This minimal funding level allows very few new activities to be undertaken. EuroGites relies for its survival on the help and goodwill of its members and on the largely unpaid efforts of its General Secretary, Klaus Ehrlich. Project funding was practically impossible to achieve in the past due to the lack of specific EU opportunities for tourism.

Funding is limited because national members often wish to concentrate their expenditure on their domestic activities, and oppose any increase in money paid to EuroGites. The value of a presence and participation in EU structures is not understood, nor are the possibilities for new product ideas or markets. EuroGites has not been able to source any money for research or the testing of innovative new products that could benefit European rural economies. Its members are all under financial pressures because much of their revenue comes from marketing - their marketing function is being increasingly lost to a range of on-line international booking agencies.

---

[69]   www.europeanrtcongress.org
[70]   http://quality.eurogites.org

Membership Issues

Following the post 1990 political changes in Europe, new members from Bulgaria, Czech Republic, Hungary, Latvia, Poland, Romania, Slovakia and Slovenia joined EuroGites, followed more recently by Bosnia-Herzegovina, Croatia, Estonia, Georgia, Israel, and Serbia. Advanced preliminary discussions are taking place with Russian interested parties, including governmental level, about future cooperation. A number of countries have left – including Germany and Italy. The leavers felt strong enough to survive alone, or had financial problems, and/or felt that the EU did not listen to EuroGites lobbying efforts. In one case, Germany, one regional organisation now allows others from the same country to benefit as free-riders (only one of the 15 German Länder is a member).

As a whole, however, the balance of the last 10 years is positive:

2002	17 members from 16 countries
2002-2012	7 members left (four expelled due to unpaid fees), 26 joined
2012	36 members from 28 countries

Developing Pan European rural tourism training courses to build capacity, increase skills, encourage sustainable development, and become more competitive

There have been attempts to develop such programmes[71], but so far they have all failed. This seems to be due to the large range of free national programmes, lack of tangible incentives or benefits for participation in training, along with the translation and adaptation cost for existing training materials (usually it is cheaper to produce own materials in each country directly), and excessive regulations. However, individual EuroGites members cooperate successfully in EU programmes like Lifelong Learning, providing access to the rest of members of the results (e.g. the online tool[72] or a recently approved project related to Safety and Security in rural tourism services, "Safetour").

There is an association of trainers in rural tourism, Rural Tourism International – Training Network (RTI-TN), which links a number of rural tourism trainers – largely European[73]. It is unclear how active this group is.

---

[71]   www.ruraltourisminternational.org
[72]   http://quality.eurogites.org
[73]   Details can be found at www.ruraltourisminternational.org

6.   SOME KEY TOOLS FOR DEVELOPMENT

This section provides a critical outline review of a number of development tools used by both rural and industrial heritage tourism. An understanding of the role of development tools is essential if effective policies are to be devised for the development of these forms of special interest tourism. Particular attention is paid to Heritage Interpretation, however, because it is often misunderstood, badly used, but is essential in the experiential marketing context to both forms of tourism.

6.1.   Heritage Interpretation

Quality Heritage Interpretation is a key product development which could make a major improvement to the fortunes of both industrial heritage and rural tourism in Europe. Both rural and industrial heritage tourism sites and areas need an interpretation strategy and programme to explain, develop and make visitors enthralled by their unique selling point - their heritage. Interpretation is a concept which dates back to the 1950s. It was a concept developed with the US National Park Service by Freeman Tilden – the third edition of his classic text is still in print (Tilden, 1977). His key principles can be summarised as:

- Interpretation that does not relate what is being described to something within the personality or experience of the visitor will be sterile.

- Information is not interpretation. Interpretation is revelation based on information.

- Interpretation is an art – any art is to some degree teachable.

- The aim of Interpretation is not instruction but provocation.

- Interpretation addressed to children requires a separate programme.

- No device is as desirable as interpretation by direct contact with a person.

Since Freeman Tilden's days, the concept of interpretation has been widened. It is now used as a tourism management device to influence visitor behaviour (Bramwell & Lane, 1993b). The positioning of visitor centres, which often contain interpretation materials, helps influence visitor flow patterns. The interpreter's message is recognised to be politically charged. And the interpretation system itself can become an attraction in its own right. Marketing (and de-marketing) can, and should, be linked to the interpretive system.

We also know much more about the many types of interpretation, about the use of themes and story lines, about linking to real life human stories, and to technicalities such as the 3 and 5 rule (not less than 3 pieces of information in any one story and not more than 5, – see Ham, 1992). All sorts of technology have been introduced, from interactive displays to QR codes and mobile phone apps. Well trained and even "old" humans are still remarkably good, however, and have lower capital costs. Both technology and humans need skilled management, support, training and updating.

There is a growing body of research available about how and why interpretation works, and how it can help build "place attachment" that can encourage repeat visits. It is becoming clear that Interpretation should link closely to the interests and values of the market as

well as the site, should link to visitor experience planning and be the device to tackle cultural valorisation issues. It should follow the sentiments expressed below:

> "*The success of a tourism product depends on what the producers see as the needs of the consumer. However many tourist (and heritage) organizations are ignorant of the motivations of the people who purchase their products. First they design products, and then they try and find buyers, instead of designing their products to meet the needs of the market.*"[74]

The dilemma is, however, how to retain the concept of authenticity through the above process (Xie & Lane, 2006). This is an on-going and fascinating dilemma in all partnerships between tourism development and cultural management.

Finally, it is important to note that no single enterprise in rural tourism can set up an effective heritage interpretation strategy for a wider area, or a destination. The subject needs research to learn more about the heritage, research to understand what the market wants, and co-ordination over a wide area to agree common themes and story lines, and to pay for the infrastructure necessary (see Phillips & Tubridy, 1994). Partnership is essential. Some larger industrial heritage sites can and do work independently, but usually partnerships can produce stronger products and brand images.

6.2. Branding

Branding is a feature of modern life. It helps consumers make decisions about which out of hundreds of products to choose. Brands are not just names, but quality marks, symbolising desired qualities and attributes. Many destinations have become brand names. Within rural tourism some brand names have appeared – usually geographical areas such as the English Lake District, the Irish Ring of Kerry, and the Salzkammergut in Austria. Austria's Farm Holidays – Urlaub am Bauernhof – group is now attaining brand status because of its close attention to quality and targeted marketing. Branding may have relevance to other rural areas and to Industrial Heritage Tourism (Clarke, 2000) and could be a valuable tool. But it is not an easy or quick fix for problems because it is not simply a name – it requires market knowledge, branding is closely linked to the self-image and identity of many customers. It must also align to the attainment of quality standards and quality delivery.

6.3. Trails

The Trail concept has become an increasingly popular one in the last twenty years. In many parts of the developed world, cycling and walking for pleasure have experienced growth. And the creation of trails, sometimes from disused or underused rights of way, sometimes from abandoned rail or canal routes, has become a passion for trails enthusiasts. In addition to non-motorised trails, there are some car based trails – the USA's scenic byways programme[75] is the biggest example, using lightly trafficked rural roads to bring tourists to forgotten areas and communities. The trail concept can be used primarily as a marketing device – the European Routes of Industrial Heritage network is of this type. There is also a broader version of the trail concept, the important activity corridor concept, bringing a

---

[74] McKercher & Du Cros, 2002 (103).
[75] www.byways.org.

broad corridor of activities together, sometimes with a spine route formed by a rail line, a road or cycle track. Activity corridors are increasingly linked to the slow travel concept.

The most successful trails can become cult destinations in themselves. Examples include the Danube cycle path, the C2C cycle route from west to east coasts in northern England, and the 780 km Caminio Frances walking/cycle trail to Santiago de Compostela in northern Spain. Many trails are not so successful: there is often little cross fertilisation between tourism and trails. Trails are often backed by non-profits and public sector agencies. Tourism is typically private sector. The former look to local users: the latter look to non-local users. And the trails which are developed are rarely conceived or designed and built with a market in mind. There is a natural synergy between trails and sustainable tourism, not least because most trails encourage slow travel by non-motorised means. But trails need professional and skilled management to maintain the infrastructure, to market the product and energise and co-ordinate the linear partnerships involved. Trails are easy to create but difficult to maintain.

The world leaders in trail development are the Rails to Trails Conservancy in the USA[76], founded in 1986 it is a well led and managed non-profit with over 150,000 members, working on over 32,000 kilometres of trails across the USA. Over the last 25 years they have evolved into a very professional group who, from beginnings in local and regional recreation, are slowly coming to terms with trail tourism. The Conservancy has a very wide range of publications, providing a factual and an inspirational base for many European trail makers.

Trails are not exactly the same concept as "routes" – see below. Trails are usually a rural tourism tool, but can be used in some cases for industrial heritage tourism purposes.

6.4.   Heritage Routes and Heritage Regions

The concept of heritage regions emerged in 1980s Canada, promoted by the Heritage Canada Foundation[77] as a way of creating tourism and conservation groups across groups of usually scattered rural communities. They allow small communities to pool ideas, marketing and lobbying (see Brown, 1996). In tourism they allow effective branding to take place, they create more viable destinations, and help promote a learning culture and innovation.

In Europe there has been an especially great interest in the concept of Heritage Routes, rather than regions. In part that interest comes from an extension of the Trails concept, (see earlier at 6.3), a concept inherited from religious pilgrimages, and one that takes the transport component of tourism activity and turns it into a product in itself. In part it is an attempt to link special interest sites in a meaningful way. And in part, in Europe, it is a political and educational statement, a way of getting neighbouring regions and countries to work together on a European level. European Transnational Routes were pioneered by the Council of Europe and are often funded and encouraged by the EU.

---

[76]   www.railtotrails.org.
[77]   www.heritagecanada.org.

_____

The expression of the Heritage Routes concept can be clearly seen in the routes developed by the European Routes of Industrial Heritage group. While this organization does much more than help develop routes, both transnational and regional, its title gives prominence to the routes concept in industrial heritage tourism. The big question that practitioners face, however, is: Do Heritage Routes work? Are the routes well used? Do they encourage tourism spend along the routes?

The Council of Europe has researched these issues in depth, publishing its 261 page provisional study "Impact of European Cultural Routes on SMEs' innovation and competitiveness" in 2010. The Cultural Routes programme of the Council of Europe was adopted in 1987. Since then 29 Routes covering 70 countries have been set up.

Eight points and quotations from that study are given below which point out very clearly the many problems with the concept, especially in relation to building tourist numbers and supporting enterprises and facilities:

1. "The economic dimension of the Cultural Routes has never been one of their major aspects. ... At the same time, tourism and sustainable development are clearly specified as part of the criteria for certification." (p.17)

2. "European networks make a vital contribution to transnational co-operation across diverse sectors of arts and heritage fields. A contemporary phenomenon, they represent a flexible and dynamic way of working which brings together professionals across Europe who share common concerns."[78]

3. "Since there is no legal system to create a "European statute" for a non-governmental organisation and, therefore, most legal statutes have to be located in one European country, (and therefore) networks are already at a disadvantage when hoping to create an equitable transnational legal base for their work." (p.38)

4. "According to the analyses of the Cultural Routes conducted within the framework of this study, there are very few shared innovation projects across national borders. Cultural Routes have few regular shared events or activities that bind their work together and give shape and reason for the international network." (p.41)

5. "It is important to note that the Cultural Routes are not business organisations, which are usually considered as innovation hubs. The Cultural Routes are rather a means to preserve and showcase European cultural identities." (p.48)

6. "Our case study research found that even at local level, data specific to the activities of the Cultural Route were generally not being collected and thus there was little awareness of the value of the economic contribution being made to local economies, and in particular to SME growth and competitiveness ... our survey also suggested that lack of resources, technical expertise and different approaches to data collection across the network was an issue." (p.63)

7. "Although the demand for Cultural Route tourism products is still very basic, the tourism offer along them is very diverse." (p.117)

---

[78]   Staines, 2003.

8. "In summary, and according to this analysis, the following is a list of the most important issues concerning the Cultural Routes that need to be addressed:

- There is low transnational connectivity of the Cultural Routes networks;

- There is lack of co-ordination at European level in the developmental and promotional strategies of the Cultural Routes;

- They have weak brand image and marketing strategies;

- There is a low degree of quality and sustainable tourism standards development/ implementation;

- There are very limited human and financial resources of the Routes;

- There is a lack of expertise in the management of the networks;

- There is poor exchange of good practices; and absence of network management and performance evaluation tools." (p.117)

The Route/European Route concept, therefore, while a much used device, appears to have serious problems. This is hardly surprising. Most tourists seek a resort or a region that acts as a resort. There is little sign that this will change. A few routes do achieve cult status but they are very few. Is there an alternative?

The most likely alternative is the Heritage Region concept, pioneered in Canada, described earlier in this section, which creates a decentralised resort, builds local loyalty and involvement, is easily understood by visitors and has been copied on a micro scale at Blaenavon in Wales (Annex G, G1), and on a macro scale very successfully by Ruhr Tourismus in Germany (see 5.1.). The Heritage Region is not a low-cost development; it requires skilled and long-term marketing and local partnership work. It does not automatically encourage European Networking. But it could do that, both by synergy marketing between related heritage regions, and by organised expertise exchanges.

6.5.   Visitor Centres

A concept created by the US National Parks Service 50 years ago, the visitor centre has been frequently used in Europe for both industrial heritage and rural tourism. It can be, and should be, a multi-purpose development, informing visitors, channelling them into suitable routes, providing a tourism related retail outlet, offering local food, and centred on a wider region as well as a specific site. And if possible there should be provision for community use.

They are tangible, capital investments often attracting public sector funding, grants and support. They can contain administrative offices, keeping administrators aware of visitor needs and visitors aware of the activity of the administrators.

But Visitor Centres can have disadvantages. There is a danger that all sites feel that they must have a dedicated new centre: often the site or region could instead use local shops or cafes or bars as para-visitor centres. Visitor centres are expensive to build, and expensive to operate. They are frequently sited at inappropriate places (often due to pressures to use

redundant buildings or cheap or publicly owned land). They may be inflexibly designed, making multi-purpose use difficult. Many architects understand little about interpretation or visitor centres, leading to inappropriate designs. The visitor information is often poorly written, and expensive to update. The local community may be alienated by the capital costs and top down approach of the centre.

Current issues in visitor centre development include the need to link them to the concept of Heritage Regions, rather than as stand-alone entities; to involve local people as volunteers, and/or as franchisees of businesses within the centres, and the need to have "action exhibits", demonstrations, events, "living history", festivals etc. linked to the centres.

Visitor Centres are usually a rural tourism tool, but can also be in some circumstances a tool for industrial heritage tourism.

6.6.   The role of Museums

Museums were not "designed" to be part of a tourism industry, but they can transform their political and financial security if they can work with tourism. This is especially true in the current situation where public sector funding for museums is being cut back. The fundamental problem is that many museums function as repositories, led by trained curators, keeping objects safely for all time. Their role as interpreter and educator, as link between past and future, is still seen as secondary by some managers. Few curators have the necessary skills to engage in marketing or to work in partnership with tourism interests. But both sides of the potential equation would benefit from a re-assessment of their relationship (see Chhabra, 2009) and could take part in the development of heritage interpretation as a key tourism product. They may become related to the visitor centre concept, but great care must be taken not to lose their conservation and curatorial skills.

6.7.   Managing Seasonal Tourism Flows

Traditionally, tourism in Europe was a very seasonal activity, peaking sharply between June and October. However, the seasonality problem has eased in recent years for many reasons, and is now much less problematic than in the past. This section explains how and discusses the management tools available to address seasonality.

Both industrial heritage and rural tourism have benefitted from the growing numbers of active older people, who are not tied to school holidays for their travels. Equally, many of the active old have sufficiently high incomes to take several holidays per year. And, for a variety of reasons, winter travel is no longer the feared experience that it once was – and has, for some, become fashionable.

On the supply side a range of management tools are available. Both forms of tourism have diversified and developed shoulder and low season activities to counteract seasonality problems. Beamish Industrial Museum (5.1.4) and the work of Ruhr Tourismus (5.1.5) are textbook examples of how to stage low season events and activities to spread tourism demand for industrial heritage. The rise of city tourism has also helped to ease the seasonality problem: much city tourism is now often at its height in the low season. Rural tourism has fewer ways out of wet/cold weather problems than the often indoor industrial heritage attractions, but has also found that the creation of events and new activities can be designed to reduce seasonality. It has benefited enormously from better wet and cold

weather clothing, with garments with breathable fabrics, effective insulation and quality design features: outdoor activity clothing has become a fashion item. The quest to keep fit by all season walking, cross country skiing and cycling has also helped; as has a range of new niche activities include ice climbing, orienteering and winter bird watching. Both forms of tourism are also beginning to employ seasonal price variation techniques, with low season offers. Beamish is a recent and successful user of variable pricing.

In short, market knowledge, skilled marketing, product innovation and tourism management have, along with changing market requirements, reduced seasonality problems.

6.8. Festivals

Festivals have become a common device in tourism and in the arts since the 1970s. They reflect an increasingly mobile and affluent population, who seek new and fashionable encounters with cultural experiences, and they also reflect an increasingly strong and effective series of marketing channels. They are used by both industrial heritage and rural tourism organisations to draw attention to their activities, to celebrate or launch new product areas, and, in many cases, to attract low and shoulder season audiences. They often use short term sponsorship as a funding source. They can be very successful indeed, but they can also be very demanding of supply side resources, and they can be temporary devices without long-term results. Capriella & Rotherham (2011) draw some interesting conclusions from Italy. They form part of a growing research and training discipline under the title of "events".

6.9. Local Development Groups

Local development groups are central to the work of much industrial heritage tourism and rural tourism. They form lobby groups, support groups, action groups and mechanisms to apply for and receive funding. They are normally voluntary but can employ paid staff especially on special project work. Understanding the psychology, motivations, strengths and weaknesses of groups is essential for their success, as is understanding that they are often short-term, which does not necessarily detract from their importance[79]. The complications in creating and sustaining local groups are dealt with by Koutsouris (2009) based on Greek experience; despite the problems outlined, local groups can be very effective. The concept of local groups has been developed into the more formal and powerful paradigm of the LEADER group, and the Local Action Group (LAG): see 6.9 below.

6.10. LEADER

LEADER stands for 'Liaison Entre Actions de Développement de l'Économie Rurale', meaning 'Links between the rural economy and development actions'[80]. Since 1991, the EU's Leader group concept and its associated Local Action Groups have become an important funding mechanism for rural development including rural tourism, and, in some cases, industrial heritage tourism in rural settings. Although now mainstreamed into national programmes, Leader Groups will continue until at least 2013, and longer in some areas. It is important to

---

[79]   Clarke (1999) provides a useful introduction.
[80]   See: http://www.leader-programme.org.uk/what-is-leader.

note their contribution here, and their hallmarks of the project method, grass-roots approach, innovation, integrated multi-sectoral actions, cooperation and partnership, area based approaches and cross-border networking. Leader groups have been very successful and while none have concentrated on tourism, they provide a proven management system for partnership operations within EU countries. Their power over the last 20 years has been such that much of the agri-tourism and rural tourism development in the EU has been related to rural development goals, rather than tourism goals.

7. ASSESSING THE PROBLEMS: INNOVATIVE SOLUTIONS

7.1. Problems and Potential

This study has described two niche market tourism sectors and shown here them to be, in principle, well-tuned to fit the needs and aspirations of our modern and evolving society. They offer considerable benefits to local economies. Industrial Heritage Tourism is estimated to be worth well in excess of €9 billion annually; rural tourism is estimated to be worth at least €150 billion annually. Because of the widespread use of volunteers, it is difficult to assess the numbers of jobs provided by industrial heritage tourism; estimates show that rural tourism provides around 900,000 jobs. Both sectors provide many additional environmental and socio-cultural benefits for local society, plus wider benefits for society nationally, across Europe and, in some cases, worldwide.

Both have great potential for future growth. Europe has always been a leader, and the largest global provider, of rural tourism: it attracts professional study visits from other countries around the world. Europe is also very much the leader and largest provider of industrial heritage tourism in the world. It too is beginning to attract professional study visits from other continents. Section 6 has set out just some of a range of developmental tools that can be used, tested, evaluated and improved in both sectors. Rural tourism, in particular, is full of innovative ideas for development and marketing. It has a range of good practice examples. Industrial heritage tourism currently has fewer innovative ideas, but could adapt many of those that rural tourism has, and it too has a range of good practice examples.

Both tourism forms have strong potential to encourage low carbon recreation and tourism, and to make tourism more sustainable. Both can offer a useful contribution to EU policy to reduce the greenhouse gas emissions by 20% by 2020 (Commission of the European Communities, 2007). Much more could be made of short-haul holidays, domestically and within Europe. There are numerous under-exploited markets domestically, including the increasingly active over 65s, and in the "traditional" export markets of North America, Australasia and Japan, and the new markets in Asia and the BRIC countries.

But within the above picture of success there are a complex series of pressing problems to be overcome before the potential described above can be developed and become sustainable. The background to the problems has been described in this study. In brief:

- Both sectors are extremely fragmented, with few effective networking or partnership arrangements in place to gain economies in scale in market research and marketing, in training and in innovation. They both suffer from weak governance systems, with only a glimmer of hope coming from some protected area managements. Governance covers the issues of advice and assistance in many forms. National rural tourism organizations were once stronger and helped provide some advice and assistance, but, as this study has shown, many of those now have problems from online marketing competition and lack of both skills and financial resources. Pan European organizations in both sectors have very severe financial problems, and a growing lack of both resource and purpose.

- Both sectors have been shown to be somewhat unprofessional in their approach to tourism - and that has been shown to be especially true of industrial heritage tourism.

- Both face great competition from resurgent professionally managed resorts, from city tourism and from long-haul competition from low cost and exotic competition across the world.

- A series of hidden threats exist. In rural tourism many of the SMEs are owned by pioneers from the growth years of the 1980s and 90s who will shortly retire and leave their businesses. The nature of rural tourism often means that few SMEs sell their businesses on. In industrial heritage, many attractions face growing maintenance costs as their heritage ages beyond its life expectancy: the most successful part of industrial heritage, railway tourism, is especially at risk, because of its reliance on bridges, tunnels, earthworks and complex machinery. Good financial results are vital.

- Both sectors have been shown to be highly reliant on public sector support, rural tourism for its infrastructure and often for landscape protection, industrial heritage for direct ownership and support of the heritage itself. Public sector support seems likely to shrink, as rival demands in the health, educational and age related benefits sector grows.

- Both sectors need to respond to new technologies in marketing, heritage interpretation and business, but find those responses difficult.

- Research and development is not easily available to many small SMEs - yet is important for their future survival.

There is, however, great unused potential that could enable all the above problems to be overcome. Examples of very successful businesses and organizations have been illustrated in both sectors, examples which contrast sharply with the many less successful ones. There are many innovative ideas and techniques that have been discussed in this study could be used. There are innumerable academic researchers who could help educate and advise - but are not organised or incentivised to do so. And en route to developing that potential there are many unsung benefits for the wider society - extending transferrable skills training for businesses, employees and volunteers, and (for rural tourism) helping keep people healthy by offering informal outdoor physical exercise through walking, climbing, cycling, etc.

This section of this study justifies intervention to solve the market failure issues that are likely to affect businesses, jobs, incomes, communities and investments made in infrastructure. Less directly, there would also be an important loss of heritage assets for future generations: tourism valorises heritage. And sectoral decline would make moves towards low carbon tourism more difficult.

Action at a European level is especially capable of finding solutions to these problems, because it can use best practice, researchers and practitioners across the EU to solve problems that would be too difficult to do nation by nation. The publication of the very comprehensive, practical and positive European Parliament Report *Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe* (A7-0265/11) in 2011 set the scene for a new era of change. The next section of this study outlines what could be done to fulfil the demands and suggestions of that for industrial heritage and rural tourism.

7.2.   Recommendations

The recommendations aim to provide information to guide future investment policies in industrial heritage and rural tourism, develop means to guide and increase the competiveness of the SMEs involved, provide effective governance systems to help partnerships and networking and create ways to develop the social, economic and environmental performance of the sectors involved. In the past large sums of money were provided by the EU to assist capital projects linked to tourism. The recommendations here concern much smaller sums to improve expertise, knowledge and operational change. It also suggests a range of delivery mechanisms to facilitate those changes. Those mechanisms should include at least two pan-European organizations as well as national organizations. The recommendations are modular and incremental. While ideally the virtual research and development centre (7.2.1) should be developed first to service and evaluate the other six recommendations, each of the recommendations could be developed separately, and incrementally, as funds and time permitted.

7.2.1.   A virtual research and development centre

The key recommendation is one developed from a point made in COM (2010) 352 final, and from point 20 in EU A7-0265/11, which called for a "Virtual Tourism Monitoring Centre". This foresees the creation of a virtual network to bring together research institutes and other key players to provide a research and advice base for all member states. While there might need to be only one network to serve both of the special interest areas under discussion, it would almost certainly be more useful if it was set up as two parts of one whole, because of the differences in product and style of industrial heritage tourism and rural tourism.

The proposal goes far beyond the dissemination of best practice. It seeks to create an organization to analyse and test performance and practice in detail, on the lines of the organisations that are used to test medical drug performance and value for money. It also seeks to provide a mechanism to deliver research and advice and to incentivise its adoption. The network would provide a unique link between researchers, state and EU policy makers and practitioners, could work with the some of major pan-European organisations listed in Section 5.4, plus others if required, and provide an innovation and research hub for industrial heritage and rural tourism. Modelled on the several years of experience developed by ALTER-Net[81] (see also Section 5.2.5), it would operate virtually with only annual face to face meetings. It would be designed so that it could move towards economic self-sufficiency after a period of perhaps 5 years, again on the ALTER-Net model. It could also learn from the experiences of the long lived Commonwealth Government of Australia's Sustainable Tourism Cooperative Research Centre, which led the way in sustainable tourism research from 1997 until 2010, and is likely to be reincarnated shortly[82].

The ALTER-Net partnership was developed through a "Network of Excellence" as part of the European Commission's 6th Framework Programme. It undertakes long-term, European-scale, inter-disciplinary research on biodiversity, ecosystems and ecosystem services using its combined expertise in ecology, social sciences, economics, information management and knowledge transfer. Those areas of research, policy and practice application could be transferred to both rural and to industrial heritage tourism - researching effective

---

[81]   See: http://www.alter-net.info/.
[82]   See: http://www.crctourism.com.au/wms/upload/resources/NewSTCRC%20WEB.pdf.

_____

governance models, creating programmes for market research that can be used by non-specialists, using Skype and webinars for consultations between group members, and bringing heritage interpretation to life in order to lengthen stay, spend and increase in-field enjoyment. Four essential features should be included:

- Key research areas should be chosen by discussions between industry stakeholders, researchers and EU tourism experts. It is essential to include stakeholder input to avoid the problems that befell the SPRITE[83] project on supporting and promoting integrated tourism in Europe's lagging rural regions which appears to have been largely academic.

- The centre must research and test innovation delivery methods, including the use of selected national rural/agri tourism and industrial heritage tourism organizations.

- The centre should produce systems to help SMEs monitor their performance and visitor satisfaction.

- Incentives to take up Continuing Professional Development events, and to adopt innovation, should also be explored.

Eventual research areas could include:

- A detailed assessment of the state of the industrial heritage and rural tourism sectors.

- Carrying out basic market research – either by collating existing materials or collecting additional materials, or both.

- Field testing a range of questionnaire and analysis packages to allow sites, communities and regions to carry out quality surveys and produce results themselves.

- Detailed and critical evaluation of a range of marketing concepts for industrial heritage and rural tourism.

- An exploration and evaluation of a range of product development ideas and techniques, including for example visitor centres.

- Field testing of a range of market related heritage interpretation ideas and products.

- An exploration of the market for both types of tourism in the growing post 65 years of age market.

- An enquiry into the governance systems for both Industrial Heritage tourism and Rural Tourism on a national and regional basis seeking to provide best ways forward for regional governance and national governance. This is a necessity in its own right and in order to assess the problems currently faced by many, but not all, national associations.

- A critical evaluation of the concept of Heritage Regions against the concept of Heritage Routes.

_____

[83]   http://ec.europa.eu/research/agriculture/projects/qlrt_1999_31211_en.htm.

- Work to assess in the industrial heritage sector how best skills training could be developed and if possible formalised. As the heritage railways group appear to be most advanced in this area, FEDECRAIL and its members may be a group to work with, perhaps working with the Council of Europe or others.

- A review of the definitions of industrial heritage tourism and rural tourism across European countries, initiatives to collect data on both subjects to common standards.

- Work to harmonise and simplify the legal requirements for small businesses in both enterprise areas.

Initial funding for the development of the proposal could come from Preparatory Actions, followed by an application to the successor to Framework Initiative 7, Horizon 2020[84].

7.2.2.   A prototype Industrial Heritage Region project.

A second recommendation is to seek funding for the development of a prototype Industrial Heritage Region project, to use innovative governance, marketing, product development, interpretation and accommodation provision. The region could be chosen by competition - if possible - across Europe. Funding would be sought from the Structural Funds. This should be regarded as a demonstration project for good practice, with regular dissemination of issues encountered and successes as well as failures. Its assessment could be carried by the virtual centre.

7.2.3.   A prototype Second Generation Rural Tourism region

The third recommendation is to seek funding, from the Rural Development section of the Agricultural Fund, for a prototype Second Generation Rural Tourism region, as a demonstration project using ideas related to those in 7.2.2 above. Its assessment could be carried by the virtual centre.

7.2.4.   A demonstration project on Slow Tourism

The fourth recommendation is for a demonstration project on Slow Tourism to be a test bed for low carbon tourism techniques, regional development and behavioural change. While this is likely to be in a rural location, it should be remembered that there has been worldwide discussion of slow city tourism. Possible sites for a rural project include Austria – which has shown great interest in this type of development - Ireland, Portugal or Italy.

7.2.5.   A Heritage Hardware Training programme

A number of industrial heritage organizations, in Austria, Belgium, the UK, Germany and the Netherlands, have discussed the concept of training young people - and others - in the repair and/or reproduction of heritage materials and hardware. That training would allow

_____

for example iron and wooden heritage items to serve museums, heritage architecture, and heritage equipment of all kinds to be conserved or replaced. A successful programme would require consultation and co-operation between heritage entities and educational organizations and qualification standards authorities. Mystic Seaport, USA, has a possible model in its maritime heritage training courses[85].

Tourism training is important but evidence given by national and pan European organizations indicate that it seems very difficult to establish a "European normed" system. The recommendations given in this section could however, provide excellent training materials to be used across Europe in existing education and training institutions, and ALTER-Net has had success with skills building summer schools, especially in management and staff capacity building.

7.2.6.   Innovative practice dissemination

A programme of dissemination of innovative practice – akin to a travelling exhibition with speakers – to tour EU members over a 5 year period to inspire change and development, to give added meaning to national and pan European bodies working in the industrial heritage and rural tourism. The programme would be backed by a website offering research results (linked to the research group) and the developments in the demonstration projects.

7.2.7.   Marketing for Asia and BRIC countries

The best of Europe's Industrial Heritage Tourism and Rural Tourism providers are of world class. While many of the recommendations in this section are concerned with raising the standards of those who are not quite the best, there is a case for also helping the best in class to develop new export markets. In part that would be a valuable Public Relations exercise for the EU and for the sectors concerned; in part it could be economically valuable. A marketing initiative for Asia and BRIC countries could work with the European Travel Commission to explore the possibilities of selected components of industrial heritage and rural tourism being developed for these markets. This could be done in conjunction with, for example, the growing industrial heritage interests in Japan, and with both the Korea and with the China Rural Tourism Associations. Such actions are foreshadowed in several places in the European Parliament Report *Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe* (A7-0265/11). The experience of the New Zealand Tourist Board (NZTB) would be useful (NZTB, 1995, 1996 a-c).

7.3.   Issues and Costs

The main recommendation raises a number of important issues. One of them must be - would EuroGites and ERIH be involved with the research organization? The immediate answer is that they should be important advisers for the group, and they should receive funds to allow that advice to be given, but that they should not automatically be the managers or developers of that group. A second question relates to decisions on the work programme and priorities of the group. Who should make the final decisions? That question

---

[84]   Preliminary discussions have been held between the main author of this report and representatives of rural tourism organisations in Korea and the People's Republic of China about a similar virtual centre, possibly linked to APEC, the 21 country Asia-Pacific Economic Cooperation group.

[85]   www.mysticseaport.org/.

is probably one best discussed with ALTER-Net and with a round table of key stakeholders under Preparatory Actions funding mentioned earlier. Sustainability indicators may also be a contested area, and it is felt that demonstration projects should include sustainability measures to test and demonstrate techniques rather than, at this stage, developing a contested European wide set of indicators.

Costs

What might be the costs of the above proposals? All recommendations are envisaged as relatively low cost and designed to be eventually self-supporting. Several of the recommendations could help regenerate pan-European development and support groups, and some national groups.

Each of the above proposals should cost less than €1 million per year, some much less than that sum*. Compared to the very large amounts spent on tourism related capital projects, that seems a low cost: ERDF funding alone related to tourism in the 2000-2006 programme amounted to €4.6 billion (European Court of Auditors, 2011). Targeted and disseminated research to improve the economic, environmental, social and cultural returns from tourism or to improve its competitive position should repay its costs very quickly.

*Capital sums for recommendations 7.2.2, 3, and 4 are not included in that outline figure: capital sums would be raised following feasibility studies on specific sites; costs for recommendation 5 depend on the intensity of the programme, on local costs and cost sharing.

REFERENCES

- Andrews, G. (2008) The Slow Food Story: Politics and Pleasure London, Pluto Press.

- Ateljevic, I. & Doorne, S. (2000) Staying within the Fence: Lifestyle Entrepreneurship in Tourism Journal of Sustainable Tourism 8 (5) 378-392.

- Barbieri, C (in press) Assessing the sustainability of agri-tourism in the US: a comparison between agri-tourism and other farm entrepreneurial ventures Journal of Sustainable Tourism in press DOI:10.1080/09669582.2012.685174.

- Beeton & Benfield (2003) Demand Control: The case for demarketing as a visitor and environmental management tool Journal of Sustainable Tourism, 10 (6),497-513.

- Bohdanowicz, P., Zientara, P & Novotna, E. (2011) International hotel chains and environmental protection: an analysis of Hilton's we care! programme (Europe, 2006–2008) Journal of Sustainable Tourism 19 (7) 797-816.

- Boniface, P. (2003) Tasting tourism: travelling for food and drink Priscilla. Aldershot: Ashgate.

- Bové, J. & Dufour, F. (2000) Le monde n'est pas une merchandise Paris, Editions la Découverte & Syros.

- Bramwell B. & Lane, B. (1993a) Sustainable Tourism: An evolving global approach Journal of Sustainable Tourism,1, (1), 1-5.

- Bramwell, B. & Lane B. (1993b) Interpretation and Sustainable Tourism: The Potential and the Pitfalls, Journal of Sustainable Tourism 1, (2) 71-80.

- Bramwell, B. and Lane, B. (2000 & 2004). Tourism Collaboration and Partnerships: Politics, Practice and Sustainability. Clevedon, Channel View Publications.

- Bramwell B. & Lane, B. (2011) Critical research on the governance of tourism and sustainability Journal of Sustainable Tourism 19 (4&5) 411-422.

- Brouder, P. & Lundmark, L. (2011) Climate change in northern Sweden: intra-regional perceptions of vulnerability among winter oriented tourism businesses. Journal of Sustainable Tourism 19, 8, 919-934.

- Brown, E. (1997). The Economic Impact of the C2C Cycle Route., Unpublished thesis, Sunderland University, UK.

- Brown, V. (1996) Heritage, Tourism and Rural Regeneration: The Heritage Regions Programme in Canada Journal of Sustainable Tourism 174-182.

- Butler, R. (Ed.) (2006) The Tourism Area Life Cycle: Volume 1 – Applications and Modifications, Clevedon, Channel View Publications.

- Butler, R. (Ed.) (2006) The Tourism Area Life Cycle: Volume 2 – Conceptual and Theoretical Issues, Clevedon, Channel View Publications.

- Ceballos Lascurain, H. (1996): Tourism, Ecotourism, and Protected Areas. Cambridge, UK: IUCN.

_____

- Chhabra, D. (2009) Proposing a sustainable marketing framework for heritage tourism Journal of Sustainable Tourism 17, 3, 303-320.

- Clarke, J. (1999) 'Marketing Structures for Farm Tourism: Beyond the Individual Provider of Rural Tourism' Journal of Sustainable Tourism 7 (1) 6-25.

- Clarke, J. (2000) 'Tourism brands: An exploratory study of the brands box model' Journal of Vacation Marketing 6 (4) 329-345.

- Clemenson, H.A., & Lane, B. (1997) 'Niche Markets, Niche Marketing and Rural Employment', in Bollman, R.D. & Bryden, J.M. (eds.) Rural Employment: An International Perspective, Wallingford: CAB International, pp 410-426.

- CMSC (2001) Tourism - The Hidden Giant – and Foot and Mouth Culture, Media and Sport Committee, Fourth Report, Vol.1. London, Stationery Office.

- Cohen S.A., Higham J.E.S., & Cavaliere C.T. (2011) 'Binge flying: Behavioural addiction and climate change'. Annals of Tourism Research, 38 (3), 1070-1089.

- Cole, D. (2004) Exploring the Sustainability of Mining Heritage Tourism Journal of Sustainable Tourism, 12, 6, 480-494.

- COM (2010) 352 final *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions : Europe, the world's No.1 tourist destination – a new political framework for tourism in Europe* Brussels, European Commission.

- Commission of the European Communities. (2007). Limiting global climate change to 2 degrees Celsius. The way ahead for 2020 and beyond: Commission of the European Communities.

- Council of Europe (2010) Impact of European Cultural Routes on SMEs' innovation and competitiveness, Strasbourg, Council of Europe.

- CPRE (Council for the Preservation of Rural England) (1994) Leisure Landscapes: Leisure, Culture and the English Countryside - Challenges and Conflicts London, CPRE.

- Crompton, J.L. (1979) Motivations for Pleasure Travel Annals of Tourism Research 6, 408-424.

- Cruise Lines International Association-CLIA-. (2008). Cruise Market Overview. Statistical Cruise Industry Data Through 2007. http://www.cruising.org/press/overview2008/printPDF.cfm.

- Dallen, J. (2007) Sustainable Transport, Market Segmentation and Tourism: The Looe Valley Branch Line Railway, Cornwall, UK Journal of Sustainable Tourism 15, 2, 180-199.

- Datzer, Robert; Seidel, Anette & Baum, Christiane (2010) *Potenziale der Industriekultur in Brandenburg*. Köln, ift Freizeit- und Tourismusberatung GmbH.

- De Jong, W. M. (1991) Revitalizing the urban core waterfront development in Baltimore, Maryland, in Fox-Przeworski, J. ed al., Urban regeneration in a changing economy: an international prospective, Oxford: Clarendon Press, pp. 185 - 198

- Demunter, C., & Dimitrakopoulou, C. (2012) *Statistics in Focus, 28/2012 "Tourism in Europe: Results for 2011"*. Eurostat.

- Deubzer, M. (1992) Handbuch: Gaeste auf dem Bauernhof, Beratungshilfe 8-92, Landshut, Staatliche Fuehrungsakademie fuer Ernaehrung, Landwirtschaft und Forsten.

- Dickinson, J.E., Robbins, D. & Lumsdon, L. (2010) Holiday travel discourses and climate change Journal of Transport Geography, 18, 482-489.

- Dickinson, J.E.,& Lumsdon, L. (2010) Slow Travel and Tourism London, Earthscan.

- Drumm, A. (2007) Tourism-based Revenue Generation for Conservation. In R. Bushell and P.F.J. Eagles (Eds.), *Tourism and Protected Areas: Benefits beyond Boundaries* (pp. 191-209) Wallingford, UK: CABI.

- Dudley, N. (ed.) (2008) Guidelines for Appling Protected Areas Management Categories. Gland, IUCN.

- Eagles, P.J.F. (2002) Trends in Park Tourism: Economics, Finance and Management Journal of Sustainable Tourism 10 (2) 132-154.

- Edwards, J.A. & Llurdés i Coit, J.C. (1996) Mines and quarries: Industrial heritage tourism Annals of Tourism Research, 23,2, 341-363.

- Elkington, J. (1997) Cannibals with Forks: the Triple Bottom Line of 21st Century Business London, New Society Publishers.

- Emerton, L., Bishop, L. and Thomas, L. (2006) *Sustainable Financing of Protected Areas*. Gland, Switzerland: IUCN.

- English Tourist Board / Rural Development Commission (1987) Visitors to the Countryside London, English Tourist Board.

- English Tourist Board (1990) Developing Rural Accommodation: A good practice guide London, English Tourist Board.

- ETC/UNWTO (2009) Handbook on tourism destination branding, Madrid, World Tourism Organization.

- Eurogites (2011) available at www.eurogites.org/documents - go to eurogites 2011_gb.ppt.

- European Commission (1968) Memorandum on the reform of agriculture in the European Economic Community: Agriculture 1980, otherwise known as "The Mansholt Plan" COM (68) 1000, Brussels, European Commission.

- European Court of Auditors, (2011) Special Report No.6 Were ERDF Co-Financed Tourism Projects Effective ? Luxembourg, European Court of Auditors.

- Fennell, D.A.& Ebert, K. (2004) Tourism and the Precautionary Principle Journal of Sustainable Tourism, 12 (6) 461-479.

- Flinn, W.L. (1982) Communities and their relationship to agrarian values, in W.P. Brown and P.F. Hadwinger (eds.) Rural Policy Problems, pp.19-32, Lexington, D.C.Heath.

- Germov, J. & Williams, L. (2009). The sociology of food and appetite. Oxford: Oxford University Press.

- Getz, D. and Page, S.J., Conclusions and implications for rural business development, in Page, S. J. and Getz, D., (eds.) (1997) The Business of Rural Tourism: International Perspectives, pp 191-205, London, International Thomson Business Press.

- Getzner, M. (2010a). Ecosystem services, financing, and the regional economy: a case study from Tatra National Park (Poland). Biodiversity 11 (1-2), 55-61.

- Getzner, M. (2010b). Impacts of protected areas on regional development: the case of the Hohe Tauern national park (Austria). International Journal of Sustainable Economy 2 (4), 419-441.

- Getzner, M., Jungmeier, M., Lange, S. (2010). People, Parks, and Money. Klagenfurt, Heyn.

- Getzner, M., Jungmeier, M. & Pfleger, B. (2012) Evaluating Management Effectiveness of National Parks as a Contribution to Good.

- Governance and Social Learning. Chapter 7 in Sladonja, B. (ed.), Protected Area Management. Rijeka, InTech. Available from: http://www.intechopen.com/articles/show/title/evaluating-management-effectiveness-of-national-parks-as-a-contribution-to-good-governance-and-socia.

- Getzner, M., Lange Vik, M., Brendehaug, E. & Lane, B. (in the press) Governance and Management Strategies in National Parks: Implications for Sustainable Regional Development, International Journal of Sustainable Society.

- Greffe, X. (1992) Rural Tourism, Economic Development and Employment, in Business and Jobs in the Rural World, pp 121-147, Paris, OECD.

- Hall, C.M. & Mitchell, R. (2000) Wine tourism in the Mediterranean: A tool for restructuring and development. Thunderbird International Business Review, 42 (4) 445-465.

- Hall, C.M. & Weiler, B. (Eds.) (1992) Special Interest Tourism London, Belhaven Press.

- Hall, P.G. (1967) The World Cities London, World University Library.

- Ham, S. H. (1992) Environmental Interpretation – a practical guide for people with big ideas and small budgets Golden, CO: North American Press.

- Hewison, R. (1987) The Heritage Industry London, Methuen.

- Higham, J.E.S. (1998) Sustaining the Physical and Social Dimensions of Wilderness Tourism: The Perceptual Approach to Wilderness Management in New Zealand Journal of Sustainable Tourism, 6, 1, 26-51.

- Hjalager, A-M. (2002) Repairing innovation defectiveness in tourism Tourism Management, 23, 465-474.

- Hjalager, A-M & Johansen, P.H. (in press) Food tourism in protected areas – sustainability for producers, the environment and tourism? Journal of Sustainable Tourism, DOI: 10.1080/09669582.2012.708041.

- Hof, M., and D. W. Lime. 1997. Visitor Experience and Resource Protection Framework in the National Park System: Rationale, current status, and future direction. In: Limits of acceptable change and related planning processes: Progress and future directions (S.

F. McCool, and D. N. Cole, eds). General Technical Report INT-371. Ogden, UT: USDA Forest Service, Intermountain Research Station. Pp 29-36, available at: www.cfc.umt.edu/personnel/...files/McCool%20SAF%20paper.pdf.

- International Centre for Research and Consultancy (2004) West Somerset Railway: Local Economic Impact Study. Manchester, Manchester Metropolitan University.

- Jansen-Verbeke, M. (1999) Industrial heritage: A nexus for sustainable tourism development Tourism Geographies, 1, (1), 70-84.

- Jensen, R. (1999 & 2009) The Dream Society: How the Coming Shift from Information to Imagination Will Transform Your Business, New York, McGraw-Hill.

- Jones, C. & Munday, M. (2001) Blaenavon and United Nations World Heritage Site Status: Is conservation of industrial heritage a road to local economic development. Regional Studies 36, (6), 585-590.

- Kajala, L., Almik, A., Dahl, R., Dikšaitė, L, Erkkonen, J., Fredman, P., Jensen, F., Søndergaard, F., Karoles, K., Sievänen, T., Skov-Petersen, H., Vistad, O.I. and Wallsten, P. (2007) *Visitor monitoring in nature areas – a manual based on experiences from the Nordic and Baltic countries*. Stockholm, Sweden: Swedish Environmental Protection Agency.

- Knapp, W., Scherhag, D. & Schmitt, P. (2006) Rhine Ruhr: "Polycentricity at its best ?" in Hall, P. & Paine, K. The Polycentrick Metropolis: learning from Mega-City regions in Europe, London, Earthscan, 154-162.

- Knowd, I. (2006) Tourism as a Mechanism for Farm Survival Journal of Sustainable Tourism, 14 (1) 24-42.

- Koutsouris, A. (2009) Social learning and sustainable tourism development; local quality conventions in tourism: a Greek case study Journal of Sustainable Tourism. 17 (5) 567-581.

- Krippendorf, J. (1984) Die Ferienmenschen, Zuerich, Verlag Orell Fuessli.

- Krippendorf, J. (1986) Alpsegen Alptraum, Bern, Kummerley & Frey.

- Kyle, G. T, Mowen, A. & Tarrant, M. (2004) Linking place preferences with place meaning: An examination of the relationship between place motivation and place attachment Journal of Environmental Psychology, (24) (4) 439-454.

- Lagroup & Interarts (2005) City Tourism & Culture: the European Experience Brussels, European Travel Commission (ETC) and the World Tourism Organization (WTO).

- Lambert, E., Hunter, C., Pierce, G.J.,and MacLeod, C.D. (2010) Sustainable whale watching tourism and climate change: towards a framework of resilience Journal of Sustainable Tourism, 18, (3), 409-428.

- Lane, B. (1994a) What is Rural Tourism ? Journal of Sustainable Tourism, 2, (1&2) 7-21.

- Lane, B. (1994b) Sustainable Rural Tourism Strategies Journal of Sustainable Tourism, 2, (1&2), 102-112.

- Lane, B. (2009) Rural Tourism: An Overview, Chapter 21 in The SAGE Handbook of Tourism Studies, Eds. Jamal, T. & Robinson, M., London, Sage Publications, 354-370.

- Lane, B. (2012) Second Generation Rural Tourism: Research Priorities & Issues, in press, Proceedings of the XII Citurdes Conference, 2012.

- Latvian Country Tourism Association (2012) Proposals for Environmental Policy and Governance Based on Demonstration of Environmental, Social And Economic Benefits from Tourism in The Slītere National Park - A Natura 2000 Territory, available at: http://www.celotajs.lv/cont/prof/proj/PolProp/Dokumenti/layman_report_eng_web.pdf.

- Lumsdon, L., Weston, R., Davies, N., McGrath, P., Peeters, P., Piket, P. and Eijgelaar, E. (2009) The European Cycle Route Network: EuroVelo Challenges and Opportunities for Sustainable Tourism. Brussels; European Parliament.

- McCool, S. (2001) Tourism Carrying Capacity: tempting fantasy or useful reality Journal of Sustainable Tourism 9 (5) 389-399

- McGehee, N.; Boley, B. B; Hallo, J.; McGee, J.; Norman, W.; Oh, Chi-Ok; Goetcheus, C. (in press) Doing sustainability: An application of an inter-disciplinary and mixed-method approach to a regional sustainable tourism project Journal of Sustainable Tourism, in press.

- McIntosh, A. & Bonnemann, S. (2006), Willing workers on organic farms (WWOOF): The alternative farm stay experience, Journal of Sustainable Tourism, 14 (1): 82-99.

- McKercher, B. & Du Cros, H. (2002) Cultural Tourism: The Partnership between Tourism and Cultural Management New York, Haworth Hospitality Press.

- Merkl, A. (2003) A New Approach to Financing Protected Areas. On WWW at http://www.conservationfinance.org/guide/WPC/WPC_documents/Apps_01_Merkl_v2.pdf. Accessed 10.7.12.

- Mertens, A. & Promberger, C. (2001) Economic Aspects of Large Carnivore-Livestock conflicts in Romania. Ursus, 12, 173-180

- Mayer, M., Muller, M., Woltering, M., Arnegger and Job, H. (2010) The economic impact of tourism in six German national parks. *Landscape and Urban Planning* 97(2), pg. 73-82.

- Mundet, L. & Coenders,G (2010) 'Greenways: a sustainable leisure experience concept for both communities and tourists.' Journal of Sustainable Tourism, 18,(5), 657–674.

- Murdoch, J. (1993) Review of the Economic Impact of Holiday Villages for the UK Rural Development Commission, Journal of Sustainable Tourism, 1, (2), 145.

- National Park Service. 1997. The Visitor Experience and Resource Protection (VERP) Framework. A Handbook for Planners and Managers. Washington, D.C.: National Park Service.

- New Zealand Tourist Board (1995) Product Development Opportunities for Asian Markets Wellington, NZTB.

- New Zealand Tourist Board (1996a) Japan Market Brief Wellington, NZTB.

- New Zealand Tourist Board (1996b) North Asia Market Brief Wellington, NZTB.

- New Zealand Tourist Board (1996c) South East Asia Market Brief Wellington, NZTB.

- NMSI, (National Museum of Science and Industry) (2011) Annual Report and Accounts, 2009-10, London, The Stationery Office.

- OECD (1990) Tourism policy and sustainable development of rural areas, OECD, Paris

- OECD (1992) Business and Jobs in the Rural World Paris, OECD.

- OECD (1994a) Tourism Strategies and Rural Development, in Tourism Policy and International Tourism OECD Paris, 13-75, (also published in French as Les Strategies du Tourisme et le Developpement Rural, in Politique du Tourisme et Tourisme International, OECD Paris, , 13-79).

- OECD (1994b) Creating rural indicators for shaping territorial policy OECD: Paris.

- OECD (1995) Niche Markets and Rural Development OECD: Paris.

- Oxford Economics (2010) *Economic impact of the UK heritage tourism economy*. Oxford, Oxford Economics.

- PA Cambridge Economic Consultants (1990) The Impact of Tourism in the Countryside, Submission to English Tourist Board (ETB) Task Force on Tourism and the Environment, London, ETB.

- Palacio, V. & McCool, S., (1997) 'Identifying ecotourists in Belize through benefit segmentation: A preliminary analysis' Journal of Sustainable Tourism, 5 (3), 234-244.

- Palau, R., Forgas, S., Blasco, D and Ferrer, B. (2012) 'An Analysis of Greenways from an Economic Perspective'. Tourism Planning & Development, 9, (1), 15-24.

- Petrick, J.F., (2010) A comprehensive analysis of the determinants of cruise tourists' behaviours. Proceedings of the 12th Leisure, Recreation and Tourism Research Symposium, National Taichung University, Taiwan.

- Phillips, A. &Tubridy, M. (1994) New supports for Heritage Tourism in Ireland Journal of Sustainable Tourism, 1, (1&2) 112-129.

- Pine, J. and Gilmore, J. (1999) The Experience Economy, Boston, Harvard Business School Press.

- Plog, S.C. (1991) Leisure Travel: Making it a Growth Market Again London, John Wiley.

- Ramkissoon, H., Smith, L.D. & Weiler, B. (2013) Relationships between place attachment, place satisfaction and pro-environmental behaviour in an Australian national park Journal of Sustainable Tourism, in press, DOI**:**10.1080/09669582.2012.708042.

- Red Kite Environment (2007) Blaenavon Industrial Landscape World Heritage Site: Visitor Experience Plan and Interpretation Plan available at: http://www.visitblaenavon.co.uk/en/WorldHeritageSite/WorldHeritageSite/Publications/VisitorExperienceandInterpretationPlan2007.pdf.

- Ruhr.Tourismus (2011) Tourismusmarketing für die Metropole Ruhr: Strategie und Massnahmen 2012-2016 Oberhausen, Ruhr.Tourismus.

- Samuel, R. (1994) Theatres of Memory, London, Verso.

_____

- Schianetz,K., Kavanagh,L. & Lockington, D. (2007) The Learning Tourism Destination: The potential of a learning organisation approach for improving the sustainability of tourism destinations Tourism Management, 28, 1485–1496.

- Sellin, S. (2000) Developing a typology of sustainable tourism partnerships, 129-42 in Bramwell, B. and Lane, B. (2000 & 2004). Tourism Collaboration and Partnerships: Politics, Practice and Sustainability. Clevedon, Channel View Publications.

- Schulze, G. (1992) Die Erlebnisgesellschaft: Kultursoziologie der Gegenwart¸ Frankfurt am Main, Campus Verlag.

- Schulze, G. (1996) The Experience Society London, Sage.

- Scott, D. & Becken, S. (2010) Adapting to Climate Change and Climate Policy: progress, problems and potentials Journal of Sustainable Tourism, 18, 3, 283-296.

- Scott, D., Peeters, P. & Goessling, S. (2010) Can tourism deliver its "aspirational" greenhouse gas emission reduction targets? Journal of Sustainable Tourism, 18, 3, 393-408.

- Shannon Peckham, R. (ed). Rethinking Heritage: Cultures and Politics in Europe. New York: I. B. Tauris. 2003.

- Sharpley R. & Craven B. (2001) The 2001 Foot and Mouth Crisis – Rural Economy and Tourism Policy Implications, Current Issues in Tourism, 4, 6, 527-538.

- Shipp, D. (1993) Loving them to death? Sustainable Tourism in Europe's Nature and National Parks, Grafenau, Federation of Nature and National Parks of Europe.

- Sims, R. (2009). Food, place and authenticity. Journal of Sustainable Tourism 17 (3): 321-336.

- Soboll, A. & Dingledey, A. (2012) The future impact of climate change on Alpine winter tourism: a high-resolution simulation system in the German and Austrian Alps Journal of Sustainable Tourism 20,1, 101-120.

- Staines, J. (2003), "Network solutions for cultural cooperation in Europe", www.efah.org/components/docs/networks_ngo_5.pdf.

- Sundbo, J., Orfila-Sintes, F & Sørenson, F. (2007) The innovative behaviour of tourism firms—Comparative studies of Denmark and Spain Research Policy, 36 (1) 88-106.

- Taksa, L., (2003) 'Machines and Ghosts: Politics, industrial heritage and the history of working life at the New South Wales Eveleigh Railway Workshops', *Labour History*, No. 85, November, pp 65-88.

- Tellström, R., Gustafsson. I. & Mossberg, L. (2006). Consuming heritage; The Use of Local Food Culture in Branding, Place Branding, 2 (2): 130-143.

- Tilden, F. (1977) Interpreting Our Heritage Chapel Hill: University of North Carolina Press.

- TNS Political & Social (2012) *Flash Eurobarometer 334, Attitudes of Europeans Towards Tourism*. Brussels, Directorate-General Enterprise.

- UNWTO (1985) The role of recreation management in the development of active holidays and special interest tourism and consequent enrichment of the holiday experience Madrid, UNWTO.

- UNWTO (2012a) World Tourism Highlights Madrid, UNWTO.

- UNWTO (2012b) UNWTO Annual Report Madrid, UNWTO.

- Urlaub am Bauernhof (2011a) Jahresbericht Salzburg, Urlaub am Bauernhof.

- Urlaub am Bauernhof (2011b) Strategie 2011-2020 Salzburg, Urlaub am Bauernhof.

- Welsh Economy Research Unit (WERU) (2001) Blaenavon Economic Impact Study, report for Torfaen County Council, and Welsh Development Agency. WERU, Cardiff Business School.

- Williams, Megan Louise (2008) The Economic Impact of the Ffestiniog and Welsh Highland Railways on Gwynedd, unpublished PhD Thesis. Bangor, Prifysgol Bangor.

- World Bank (2012) Turn down the heat: why a 4C warmer world must be avoided Washington, DC, The World Bank.

- World Commission on Environment and Development (1987) The Brundtland Report Oxford, Oxford University Press.

- World Trade Organization (1998) Tourism Services: Background note by theSecretariat. Retrieved July 12th, 2012 from: http://www.wto.org/english/tratop_e/serv_e/w51.doc.

- Xie, P.F. & Lane, B. (2006) A Life Cycle Model for Aboriginal Arts Performance in Tourism: Perspectives on Authenticity Journal of Sustainable Tourism 14 (6) 545-561.

- Yorkshire Tourist Board (2012) *National Railway Museum: Economic Projections 2012-2016*. York, Yorkshire Tourist Board.

ANNEX A: CONTRASTING FEATURES BETWEEN URBAN/RESORT TOURISM AND RURAL TOURISM

Table 7:   Contrasting features between urban/resort tourism and rural tourism

Urban/Resort Tourism	Rural Tourism
Little open space	Much open space
Settlements over 10,000	Settlements under 10,000
Densely populated	Sparsely populated
Built environment	Natural environment
Many indoor activities	Many outdoor activities
Infrastructure - intensive	Infrastructure - weak
Strong entertainment/retail base	Strong individual activity base
Large establishments	Small/medium size establishments
Nationally/internationally owned firms	Locally owned businesses
Much full time involvement in tourism	Much part-time involvement in tourism
No farm/forestry involvement	Some farm/forestry involvement
Tourism interests self-supporting	Tourism supports other interests
Workers may live far from workplace	Workers often live close to workplace
Rarely influenced by seasonal factors	Often influenced by seasonal factors
Many guests	Few guests
Guest relationships anonymous	Guest relationships personal
Professional management	Amateur management
Cosmopolitan atmosphere	Local atmosphere
Many modern buildings	Many older buildings
Development/growth ethic	Conservation/limits to growth ethic
General in appeal	Specialist appeal
Broad marketing operation	Niche marketing

Source: Lane (1994).

ANNEX B: TOURISM TYPES: RURAL AND URBAN

Rural tourism cannot be defined solely by tourism type: intensity of use, location, style of management, integration and acceptance by the community and other factors play an important part of the definition. Many types of tourism can be developed in both urban and rural locations. And tourists can be involved in both urban and rural activities on the same day. A tentative classification is given below: it should be used pragmatically and with care.

Tourist activities which are usually specifically rural

1.   Walking

2.   Climbing/Rock climbing

3.   Adventure holidays/wilderness holidays

4.   Canoeing

5.   Rafting

6.   Cross country skiing

7.   Snow shoe tours

8.   Low intensity downhill skiing

9.   Nature study in outdoor settings, including bird watching, photography etc.

10.   Ecotourism/safaris

11.   Hunting

12.   River, lake and canal angling

13.   Cycling/cycle touring

14.   Mountain biking

15.   Horse Riding

16.   Landscape appreciation

17.   Rural heritage studies

18.   Small town/village touring

19.   Relaxation holidays requiring a rural milieu

20.   Small scale conventions/conferences

21.   Rural festivals

23.   Sports requiring natural settings, e.g. orienteering

24.   Farm holidays

25.   Farm holidays using farms as a base for rural touring

Tourist activities which may be rural or urban/resort based

1.   Swimming

2.   Low/medium intensity beach holidays

3.   Medium intensity downhill skiing

4.   Sports requiring man made infrastructure of a semi natural type - e.g. golf

5.   Cuisine based holidays

6.   Speciality food product based holidays, e.g. vineyards

7.   General heritage based holidays

8.   Conservation work holidays

9.   Educational holidays

10.   Cultural festivals

11.   Craft holidays

12.   Camping

13.   Sightseeing/touring

14.   Small/medium sized conferences/conventions

15.   Sailing/cruising

16.   Sea angling

17.   Gambling/gaming

18.   Business tourism

Tourist activities which are usually specifically urban/resort based

1.   City sightseeing

2.   Shopping

3.   High intensity beach holidays

4.   High intensity downhill skiing

5.   Urban heritage/culture holidays

6.   Health resorts/spas

7.   Industrial tourism

8.   Zoological gardens

9.   Major conferences/conventions

10.   Entertainment holidays/gambling

11.   Resort holidays

12.   Sports requiring man made infrastructure, e.g. national/international arena based events

13.   Business tourism

Lane (1994).

ANNEX C: TOURISM PARTNERSHIPS: BENEFITS, PROBLEMS AND WAYS FORWARD

Table 8: Potential benefits of collaboration and partnerships in tourism planning

There may be involvement by a range of stakeholders, all of whom are affected by the multiple issues of tourism development and may be well placed to introduce change and improvement.

Decision-making power and control may diffuse to the multiple stakeholders that are affected by the issues, which is favourable for democracy.

The involvement of several stakeholders may increase the social acceptance of policies, so that implementation and enforcement may be easier to effect.

More constructive and less adversarial attitudes might result in consequence of working together.

The parties who are directly affected by the issues may bring their knowledge, attitudes and other capacities to the policy-making process.

A creative synergy may result from working together, perhaps leading to greater innovation and effectiveness.

Partnerships can promote learning about the work, skills and potential of the other partners, and also develop the group interaction and negotiating skills that help to make partnerships successful.

Parties involved in policy-making may have a greater commitment to putting the resulting policies into practice.

There may be improved co-ordination of the policies and related actions of the multiple stakeholders.

There may be greater consideration of the diverse economic, environmental and social issues that affect the sustainable development of resources.

There may be greater recognition of the importance of non-economic issues and interests if they are included in the collaborative framework, and this may strengthen the range of tourism products available.

There may be a pooling of the resources of stakeholders, which might lead to their more effective use.

When multiple stakeholders are engaged in decision-making the resulting policies may be more flexible and also more sensitive to local circumstances and to changing conditions.

Non-tourism activities may be encouraged, leading to a broadening of the economic, employment and societal base of a given community or region.

Table 9: Potential problems of collaboration and partnerships in tourism planning

In some places and for some issues there may be only a limited tradition of stakeholders participating in policy-making.

A partnership may be set up simply as 'window dressing' to avoid tackling real problems head on with all interests.

Healthy conflict may be stifled.

Collaborative efforts may be under-resourced in relation to requirements for additional staff time, leadership and administrative resources.

Actors may not be disposed to reduce their own power or to work together with unfamiliar partners or previous adversaries.

Those stakeholders with less power may be excluded from the process of collaborative working or may have less influence on the process.

Power within collaborative arrangements could pass to groups or individuals with more effective political skills.

Some key parties may be disinterested or inactive in working with others, sometimes because they decide to rely on others to produce the benefits resulting from a partnership.

Some partners might coerce others by threatening to leave the partnership in order to press for their own case.

The involvement of democratically elected government in collaborative working and consensus building may compromise its ability to protect the 'public interest'.

Accountability to various constituencies may become blurred as the greater institutional complexity of collaboration can obscure who is accountable to whom and for what.

Collaboration may increase uncertainty about the future as the policies developed by multiple stakeholders are more difficult to predict than those developed by a central authority.

The vested interests and established practices of the multiple stakeholders involved in collaborative working may block innovation.

The need to develop consensus, and the need to disclose new ideas in advance of their introduction, might discourage entrepreneurial development.

Involving a range of stakeholders in policy-making may be costly and time-consuming.

The complexity of engaging diverse stakeholders in policy-making makes it difficult to involve them all equally.

There may be fragmentation in decision-making and reduced control over implementation.

The power of some partnerships may be too great, leading to the creation of cartels.

Some collaborative arrangements may outlive their usefulness, with their bureaucracies seeking to extend their lives unreasonably.

How can strategic partnerships be made to work better? How can partners move from a win /lose system to a win/win relationship?

There are a range of ways forward that have a proven track record. These include:

- Understanding the range of partnership approaches and the need to adopt the right type of partnership for the situation on hand – an obvious statement but one often not heeded. Steve Sellin (2000) provides a useful outline of tourism typologies, classified according to a number of dimensions – geographic scale, legal basis, locus of control, diversity and size, and time frame.

- The importance of inclusion – the ability for all partners to feel ownership of decisions and of the decision-making process.

- The need to understand that strategic relationships are learning systems as well as mechanisms for change, and that learning is in itself a valuable activity that can pay dividends. A key related area to understand here is that of capacity building – the capacity of local businesses and communities to grow and contribute, the capacity of tour operators and other outside players to understand and assist, and the need for environmental and cultural groups also to develop a capacity to work with the world of tourism without compromising their essential capital.

- The need to set the correct intensity for the partnership arrangement, and to distinguish between "centred" partnerships and "networked" partnerships.

- The importance of resources and the capacity for tangible action resulting from collaboration – from political action to action on the ground. Nothing succeeds like success.

- The central role of the broker, able to maintain progress in the relationship, to seek outside help and ideas when necessary, to turn destructive conflict into constructive conflict, to help weak voices speak, and equally, to help strong voices learn to listen.

- The need to evaluate progress, be flexible, optimistic yet to understand that partnerships have a life cycle, and need not exist forever.

Source: Bramwell & Lane (2000 and 2004).

ANNEX D: VIAS VERDES LIST OF GREENWAYS

Table 10:   Vias Verdes: List of Greenways

Name	Distance	Location
The Vasco-Navarro Railway Greenway	84.4 km	Alava - Navarra
Sierra de Alcaraz Greenway	74.0 km	Albacete
Xixarra II Greenway	15.0 km	Alicante
Alcoi Greenway	10.0 km	Alicante
Maigno Greenway	22.0 km	Alicante
Torrevieja Greenway	6.7 km	Alicante
Lucainena Greenway	5.0 km	Almeria
Senda del Oso Greenway	36.0 km	Asturias
Pas Greenway	34.0 km	Cantabria
Ojos Negors I Greenway	67.7 km	Castellón - Valencia
Sierra Greenway	36.0 km	Cádiz - Sevilla
Via Verde de la Subbéttica Greenway	56.0 km	Córdoba
Campiña I Greenway	28.0 km	Córdoba
Carrilet I Greenway	54.0 km	Girona
Carrilet II Greenway	39.0 km	Girona
Ferró I Carbó Greenway	15.0 km	Girona
The Plazaola-Leitzará Greenway	41.0 km	Guipuzcoa-Navarro
Arditurri Greenway	11.0 km	Guipúzcoa
Mutiloa-Ormaiztegi Greenway	4.5 km	Guipúzcoa
Urola Greenway	22.5 km	Guipúzcoa
The Olive Oil Greenway	55.0 km	Jaén
Cidacos Greenway	34.0 km	La Rioja
Prejano Greenway	5.0 km	La Rioja
Rio Oja Greenway	25.0 km	La Rioja
Tajuña Greenway	49.0 km	Madrid
The 40 Days Train Greenway	14.0 km	Madrid

		Location
Northwest Greenway	48.0 km	Murcia
Plazaola Greenway	40.0 km	Navarra-Guipuzcoa
Bidasoa Greenway	39.0 km	Navarra-Guipuzcoa
Sierra Norte de Sevilla Greenway	15.0 km	Sevilla
Terra Alta Greenway	23.0 km	Tarragona
Ojos Negros II Greenway	92.0 km	Terual
Val de Zafan Greenway	33.6 km	Terual
Jara Greenway	52.0 km	Tóledo
Safor Greenway	7.0 km	Valencia
Xurra Greenway	15.0 km	Valencia
Arrazola Greenway	5.0 km	Vizcaya
Atxuri Greenway	3.8 km	Vizcaya
Paseo Itsaslur Greenways	2.2 km	Vizcaya
The Montes de Hierro Greenways	42.5 km	Vizcaya

Source: http://www.viasverdes.com/GreenWays/Itineraries.

ANNEX E: FEDECRAIL – BREAKDOWN OF NATIONAL MEMBERSHIP

Table 11:   FEDECRAIL - National umbrella organisations membership

Country	A[1] Members	B[2] Members	C[3] Members	Total Membership
Austria	11	20	7	38
Belgium	4	1	6	11
Bulgaria	0	1	0	1
Czech Republic	0	1	0	1
Denmark	1	14	1	16
Estonia	0	0	1	1
Finland	0	5	8	13
France	6	10	67	83
Germany	19	46	29	94
Greece	2	0	0	2
Hungary	0	2	0	2
Italy	7	6	0	13
Latvia	0	0	1	1
Luxembourg	0	0	1	1
The Netherlands	8	12	8	28
Norway	2	1	5	8
Poland	1	0	5	6
Portugal	0	1	0	1
Romania	0	1	0	1
Russia	0	3	0	3
Serbia	0	1	0	1
Spain	0	2	0	2
Sweden	4	22	28	54
Switzerland	0	2	1	3
Ukraine	0	1	0	1
United Kingdom	82	46	114	242
Eire	2	7	4	13
Total	**149**	**205**	**286**	**640**

[1]   Category A: Organisations owning items of rolling stock but not owning infrastructure on which to operate.

[2]   Category B: Organisations running museums and operating railways within the confines of their museum sites.

[3]   Category C: Organisations running museums and operating railways which venture outside the confines of their museum sites and offer a public service.

ANNEX F: MAIN REASONS FOR HOLIDAY – CULTURE/RELIGION

Country	%
Austria	26
Belgium	22
Bulgaria	5
Cyprus	6
Czech Republic	15
Denmark	18
Estonia	18
Finland	18
France	11
Germany	21
Greece	5
Hungary	9
Ireland	8
Italy	16
Latvia	13
Lithuania	10
Luxembourg	16
Malta	16
Netherlands	22
Poland	8
Portugal	15
Romania	6
Slovakia	10
Slovenia	5
Spain	17
Sweden	13
United Kingdom	7

Source: *TNS Political & Social (2012).*

ANNEX G: ADDITIONAL CASE STUDIES

G1. Blaenavon World Heritage Site: A case study in regeneration through Industrial Heritage Tourism

This study, and study G2, add an understanding of the difficulties in using heritage as a regeneration tool to section 5.6

The small town of Blaenavon (population 6,000) in South Wales is one of the best surviving examples of a total townscape, landscape and linked artefacts created by industrial development in the eighteenth and nineteenth centuries. It once led the world in technology and industrial innovation. Iron and coal was mined here, and steel was made; radical new processes were invented and used here. By 1980 all major industrial activity had ceased. Blaenavon is located 50 km north-east of Cardiff, at the head of a valley, with high winds, rainfall and frequent winter cloud cover. Since 1980 it has sought to use industrial heritage tourism as a tool for regeneration. The Blaenavon Industrial Landscape was designated as a World Heritage Site (WHS) in November 2000.

The total site includes:

- The Blaenavon Iron Works, built in 1789, and then one of the largest iron works in the world. There are ruined remains of blast furnaces, kilns, casting houses, a balancing tower and a series of well-preserved workers' houses. The Sydney Gilchrist Thomas Obelisk commemorates his key role in the development of modern steel making. The iron works is in the care of CADW, the Welsh National Heritage Agency, and open to visitors from April to October.

- The Big Pit: a deep (90 metres) coal mine open to the public with underground guided tours. It has a modern heritage centre, a multi-media virtual gallery, blacksmith's shop, shop and canteen. Part of the National Museum of Wales, it is open throughout the year.

- The Pontypool and Blaenavon Railway which closed in 1980 and is now operated exclusively by volunteers on summer weekends. It is owned by a company limited by guarantee, a non-profit organisation.

- The town of Blaenavon, including the imposing Workmen's Hall and Institute, churches, chapels and a small range of retailers, and a recently opened cafe.

- The World Heritage Site centre, opened in 2008, giving an overview of the World Heritage Site, its history and community.

- The Alexander Cordell Museum, with the story of the novelist who described life in nineteenth century South Wales through his best-selling books.

- The wharfs and waters of the Monmouthshire and Brecon Canal.

- A series of former tramways and inclined planes connected with the industrial past.

- A range of relict industrial landscapes on the high moor land above Blaenavon, with a series of signed public footpaths giving access.

The end of the heavy industrial era saw Blaenavon's population fall from 12,000 in 1921 to 6,000 in 2001. In 1997 the Blaenavon Partnership was formed between 12 public sector agencies to regenerate the town through industrial heritage tourism. World Heritage Site status was achieved in 2000. The Partnership has invested heavily in the town's buildings and on landscape improvements. The UK's Heritage Lottery Fund[86] has given c. £7 million to assist Blaenavon's regeneration, which is still on-going[87].

The partnership co-ordinates the work of the 12 agencies, sets up events and cultural activities, and consults and engages with the community. A Marketing Plan and an Interpretation Plan have been written, car parks created, brown signs for tourists set up around the town and an "Iron Mountain" hiking trail devised and sign posted.

It is important to note, however, a series of problems in using tourism as a regeneration tool for industrial heritage, some of which are peculiar to Blaenavon, but many of which are common to other industrial towns:

- The concept of a small industrial heritage destination is essentially an intellectual one. It does not rely on the same market triggers as typical tourist destinations – a warm climate, sea bathing, night life, fashionable cultural events, spectacular scenery etc.

- There is almost no overnight accommodation in Blaenavon, and few places to eat, especially in the evening.

- Few of the former industrial workers' houses are big enough to take visitors.

- Few former industrial workers have the capital or the entrepreneurial skills and experience to develop tourism based businesses.

- There is very little private sector investment in Blaenavon linked to tourism.

- There are considerable distances between the individual heritage sites.

- The Big Pit coal mine is a dominant attraction – it is free of charge, interesting, has good parking, eating and shopping facilities. On average visitors spend around 2 hours 30 minutes there. It is about 1 kilometre from the town. Only 3% of Big Pit visitors visit Blaenavon town or elsewhere in the World Heritage Site after their Big Pit visit.

- The Iron Works receives relatively few visitors (12,000 per year in comparison to Big Pit's 150,000). It is expensive to visit, has a relatively dull interpretation plan. Both Big Pit and the railway are more "exciting". It is closed in the winter season.

- There is no real understanding amongst visitors of what a World Heritage site (WHS) is – 36% of visitors after visiting Big Pit did not know that they were in a WHS. 88% were unsure if they had never been to one. See 5.1.2

- The WHS is not signposted until visitors cross the town boundary. The WHS is not signed for reasons of cost and negative highway department policies.

---

[86] See: www.hlf.org.uk.
[87] Details of the regeneration work are available at:
http://www.visitblaenavon.co.uk/en/WorldHeritageSite/WorldHeritageSite/Regeneration.aspx.

G2. The mining towns of Belmez and Peñarroya-Pueblo Nuevo, Andalusia, Spain: a case study in risk averse inertia

This case study draws on research undertaken by the University of Cordoba into two adjacent towns which have considered using their former mining heritage as an industrial heritage resource. Both are small towns with a medieval heritage upon which a nineteenth century coal mining heritage was superimposed. Closure of the mines has seen the population of Belmez decline from 9,200 in 1960 to 3,700 in 2007. Peñarroya-Pueblo Nuevo is larger with 11,000 people, but it too has declined, from the 28,000 who lived there in 1950. Both are situated about 80 km north east of Cordoba city, an important regional heritage tourism centre.

The industrial archaeology of coal mining remains much in evidence, with a series of exceptionally fine tall brick chimneys, and a number of pit head winding gear houses. Each town has a mining museum. There are a number of very interesting former industrial buildings that could be restored and reused.

The Upper Guadiato Valley Rural Development Group was set up in 1995 reflecting broad local interest, both public and private. This group encouraging rural accommodation development to increase the number of visitors to this area, attracted by its heritage and its hunting and sporting activities. It hopes to restore a local railway line to act as a site visit system. The area, along with neighbouring sites, is on the tentative list of UNESCO for World Heritage site status. Survey work shows strong potential support for the project from the local population and from existing tourists. It has, however, been impossible to obtain financial backing for the scheme or effective political support. The concept of industrial heritage tourism is said to be not understood in Andalusia, and it may be that distance from major domestic markets, lack of resorts with international tourists close by, and the risks involved may render this project unworkable. There is also competition from the Minas de Rio Tinto site near Huelva, with an existing 22 km long steam railway and the spectacular Corta Atalaya, once the largest opencast mine in Europe and dubbed "Mars on Earth". Regeneration through industrial heritage tourism is not easy: without finance, skilled advice and a strong regional tourism organization, may be impossible.

G3. Rural Tourism: The accommodation sector: Concepts, features and performance

This study adds detail to the Rural Tourism study at 5.2.1

Unserviced accommodation provision

Campsites: At their simplest, campsites are a low capital, low employment, low income and low annual occupancy rate type of provision. In recent years there has been the rise of glamping – glamorous camping – with fixed tents, yurts and other tent forms. Occupancy levels in rural campsites vary, but annual figures between 20% and 60% are typical, depending on style of provision and location. In environmental terms, an important feature of the campsite is its non-permanent nature. It is also possible to integrate campsite provision with agriculture. A hay / silage crop can be often obtained prior to the holiday season: after the season, grazing can recommence.

Caravan/Recreational Vehicle Sites: This type of provision was also once very basic provision, but has tended to grow in size and service level. Caravan sites can be divided into static caravans and touring caravan sites. Lengths of stay tend to be longer at static sites. Recreational vehicles (RVs) or camper vans extend the caravan concept. Caravan

_____

sites are often, but not always, mixed with tented campsite provision. Occupancy rates are usually similar to campsites, with levels of 25-65%. Large caravan sites are often found objectionable because of their visual intrusion.

Camping Barns/Stone Tents: The concept of the camping barn or stone tent is a relatively new. Popular in the UK, and in some Alpine countries, it is a product of agricultural changes which requires fewer stone or brick built barns for winter fodder and other purposes. Usually too lightly built to be converted into permanent dwelling houses, these buildings can provide basic tourism shelters at minimum conversion cost and with little physical change. They appeal enormously to young people and family groups. Users bring their own sleeping bags and cooking equipment. Cold water and toilet facilities are provided. Income levels from camping barns are low, but little capital and little labour is required. Occupancy rates depend on location: figures of 30% to 55% are achieved. The camping barn is important in cultural conservation terms. Traditional buildings are retained as landscape features: without tourism use they would be demolished or collapse.

Hay/Straw barns/"Sleep in the Hay": An intriguing variation on the camping barn has been developed in Southern Germany, France and Switzerland. Guests sleep in barns that are in use, and have hay in them. This cheap form of accommodation is "romantic", heritage rich and natural. Income levels are low, and the season for hay barn accommodation is very short. But capital costs are very low. Smoking is *absolutely* forbidden, and smoke detectors are vital. Many farms also provide breakfast and communal washing/toilet facilities.

Self-catering Accommodation – New Build: Self-catering accommodation has become a growing market throughout the world for a number of reasons. It affords maximum privacy for guests, and minimum disturbance for the owners of the property involved. It can offer economical holidays for large families/groups. For property owners, self-catering houses offer a tangible financial asset without the problems that long-term tenancies may bring. In established rural tourism areas there is often sufficient market demand to finance the building of new self-catering accommodation, usually on existing farm premises. Deubzer (1992) has design tips. In a good location, occupancy levels of 75/80% can be obtained.

Self-catering Accommodation - Conversions: The typical self-catering house is usually a conversion from either a former house or a farm building. Conversion requires architectural and design skill, and knowledge of market requirements: Deubzer (1992) offers advice. Well converted properties, in good locations, can obtain high rents, and occupancy levels of up to 75/80% in many parts of Europe. Like stone tents, the conversions conserve the rural built heritage.

Speciality Self-catering: An important niche market within self-catering is that of speciality properties of an unusual building type: former railway stations, wind or water mills, jails or castles are all examples. The most important European player in this market is the Landmark Trust, a charitable foundation with over 190 properties in Britain, France and Italy[88]. With good marketing, occupancy levels can be high: over 90% in some cases.

Time Share: First conceived in France but developed in the USA in the 1980s. It is now slowly spreading into Europe. It is typically applied to large older properties converted into a number of units: a warehouse, manor house or military barracks. Units are sold on a time-limited basis (for example 30 years) to owners who purchase the right to use the

---

[88]   www.landmarktrust.co.uk.

property for a specific week or weeks each year. An annual maintenance charge is taken from each time-share owner for upkeep. Time-share can be a useful concept for some types of large rural properties and estates.

Serviced accommodation provision

Serviced accommodation – supplying sleeping accommodation, meals, personal attention and service – is the longest established form of rural accommodation. It is a form which has grown only slowly in recent years, because of the market's emphasis on the unserviced sector. Serviced accommodation brings considerable interaction between hosts and guests. That can be a problem for some family run business, and for some guests. But, it can equally widen the horizons of the hosts, ease the loneliness of rural life and bring hours of fascinating conversation. Guests enjoy the personal contact, and talking to local people. Personal contact is regularly reported to be a key reason why many guests choose rural holidays (English Tourist Board, 1987).

Bed and Breakfast: Over much of rural Europe, Bed and Breakfast accommodation – Zimmer Frei in German speaking lands, Chambre d'Hôte in French – is the traditional small scale way of offering hospitality to rural tourists. The size of such enterprises is typically in the range from 2 to 10 bed spaces. En suite accommodation is becoming the norm. The layout of the house is important to give family and guests some separation and privacy. The attitude of the family to the constant flow of guests can be critical. The skill of the host – usually the wife – in cooking, house decoration and welcoming is also central to business success. Capital costs can low.

Income from bed and breakfast is rarely great: typical figures may be as low as €10-15,000 per year. But that gives wives a measure of independence, can pay for domestic improvements, a car, children's education etc. It is an activity that can be carried out while the host's children are small, and does not require transport to travel away from the house. Occupancy levels are very variable from 25% to 70%: some owners deliberately do not seek to operate all year for family and personal reasons. Some bed and breakfast houses offer optional evening meals: that practice is in decline.

Farm House Bed and Breakfast: Farmhouse accommodation forms a sub group within the bed and breakfast sector. Farmhouses can attract an additional special clientele keen to experience farm life at first hand. Farm accommodation providers must capitalise on that additional niche market wherever possible. Deubzer (1992) provides a wealth of practical information.

Hostels/Group Accommodation: Hostels are another very traditional way of providing visitor accommodation in the countryside. The hostel of the past was usually affiliated to a national hostel organization, was deliberately low cost and spartan, with communal dormitories rather than individual bedrooms. Food provision was basic with little choice. The trend throughout Europe has been to improve standards. Costs now vary from low to medium, and not all hostels are linked to a traditional national organization: there are numerous new "private" hostel groups. Hostels are unlikely to be major employers or major profit centres but can provide steady visitor flows and permanent jobs as they improve both their accommodation and marketing. Occupancy levels are generally 50 to 70%.

Guest Houses: The Guest house ("Pension" in German speaking lands) is a traditional rural accommodation type in many countries. It provides a compromise between the small size and limited facilities of the bed and breakfast, and the full facilities of the hotel. It will have facilities such as a guests' lounge and offer evening meals, but these facilities will not be available to non-residents, nor will there be a public bar. Guest houses typically have between 10 and 30 beds. Occupancy levels are usually between 45 and 60%.

Hotels: The traditional rural or country town hotel is a central part of the rural heritage throughout the world. With bars, dining rooms, and facilities for events, it is often a local institution. Many rural hotels are experiencing a revival as they capitalise on their heritage status, as business conferencing grows and low season business grows through weekend breaks and events. New boutique and other speciality hotels are extending the range. They may specialise in food service, organic produce, walkers, bird watchers, etc. – with facilities, service and marketing skills to match their speciality. Rural hotel occupancy levels range from lows of 35-50% and to highs of up to 80%. Some rural hotels are experiencing competition from chain hotels – especially in France, and on major through routes.

Sustainability should be part of all rural tourism's activities: accommodation is no exception. Increased use of re-cycling and environmentally friendly building and business techniques should be incorporated into all rural accommodation types. The major hotel chains are already far ahead in this area: see for example Bohdanowicz, 2011. The classic example of environmentally friendly rural accommodation provision is the Hotel Ucliva in Waltensburg, Graubunden, Switzerland. This 70 bed hotel dating from 1983 is built of energy efficient, environmentally friendly materials, specialises in locally purchased, organic/semi-organic home cooked food, offers a range of low impact activities for guests and has exemplary employment and local involvement policies[89].

G4.   Life Style Entrepreneurs: Studies of Rural Accommodation in Spain and Sweden

This section adds substance and examples to the discussion of lifestyle entrepreneurs in section 5.2 on rural tourism.

Flinn (1982), writing about rural USA, noted the arrival of a new type of rural person, those who moved from the city to the countryside because they preferred rural life. He lists three very different types of rural society:

1. Small town society, closely knit, strongly believing in democracy, but often not in close contact with nature.

2. Agrarian society, based on family farming, farm life and the calendar of the seasons.

3. Ruralists, living outside towns, but not farming: independents who value open space, nature, and 'a natural order'.

Flinn was describing "ruralists" in the 1990s. They became known later as lifestyle entrepreneurs (see Ateljevic & Doorne, 2000). Lifestyle entrepreneurs have grown in numbers and become important players in the development of rural tourism. They are important for several reasons. They understand urban markets; they bring new skills; they bring new networks; they bring additional capital; they bring confidence.

---

[89]   See www.ucliva.ch.

Two cases where life style entrepreneurs have developed new enterprises are described:

Hotel Torre del Visco, Valderrobres, Teruel Province, Spain

This enterprise is situated 12 kilometres from Valderrobres, (population 1,980) in Northern Spain in the province of Teruel, in the Aragón region. Valderrobres is approximately 250 km from Barcelona, and 170 km from Zaragoza. The site is 620 metres above sea level, with good views across farmland and forest to high mountains. Teruel is one of the poorest provinces in Spain, with little tourism. Lifestyle entrepreneurs, in this case from Madrid and previously publishers, purchased a near derelict 90 hectare farm and fifteenth-century manor house, and developed a high quality boutique hotel and restaurant. There are 11 bedrooms and 3 suites; 28 guests can be accommodated to the best European country house standards, with individually furnished en suite bedrooms, numerous lounges and sitting areas, bar and excellent dining facilities. There are open fires and a grand piano. All meals are prepared in the hotel's own kitchens using, wherever possible, produce from the farm and its gardens.
The development took place in the late 1990s; the complex employs 10 workers in addition to the owners. Eight workers are engaged in hotel based activities, and two on the farm. The business specialises in middle class professional customers, and has an important long weekend-break trade. There is walking available in the nearby hills, mountain bikes are available, longer guided walks, horseback riding and hunting possibilities. Within the hotel, care has been taken to offer a totally peaceful and relaxing experience.

The hotel illustrates that motivated and resourceful life style entrepreneurs can make a valuable contribution to rural tourism development, even in remote areas with little existing tourism. Key elements in its success included:

- Owners with University level education, language skills, and business experience – but not in tourism or hospitality.

- Knowledge of the quality market, and of niche markets and marketing.

- A long-term view that did not seek immediate financial success.

- Both owners were in their mid-40s when they embarked on their new careers.

- They were used to working through the considerable bureaucracy surrounding small business development in Spain. They noted when interviewed that public sector bureaucracy had been a hindrance as was the slow speed of payment of around 10% of capital costs by the EU LEADER project.

- Both owners had a great interest in, and knowledge of, quality design, good food and wine.

The hotel works with a number of up-market booking agencies. On-line 24/7 reservation is available directly using the hotel's web site[90].

---

[90]   http://www.torredelvisco.com.

_____

A small farm in Sweden offering tourism accommodation and more

This farm is situated on the island of Öland, an island in the Baltic Sea, linked to the city of Kalmar by a 6 km long bridge. It is a small farm of 16 hectares, originally growing a range of arable crops and raising pigs and sheep. A change of owner in 1988 resulted in growing more specialised crops – including asparagus, garlic and herbs, and later some overnight bed and breakfast accommodation was added.

This farm is a classic small farm struggling to survive in a beautiful but slightly remote location: it is the type of farm that the Mansholt Plan sought to eliminate.

A new owner from the city of Malmo, with an academic background and no farming experience purchased the farm in 2008. He has taken a very different - but equally "text book" - approach to the Spanish example described previously. He has expanded the accommodation provision, building three new summer houses and expanding the original accommodation to offer 60 beds in total. Most rooms are budget style, with shared bathrooms. The farm is classified as a hostel. A cafe/restaurant has been added and a farm shop opened to encourage direct sales of vegetables, herbs and meat from the small number of pigs (12) and sheep (20) kept on the farm. Meat is processed locally into sausages, and jam is made from locally produced fruit. Production has become organic. Bikes are available for rent. Two horses have been purchased to offer rural riding experiences. Marketing is done via word of mouth, a web site and listings on the sites of bookings.com and Svenska Turistföreningan – the Swedish Youth Hostel Association. There is no print based marketing.
Guests appreciate the simplicity of this type of tourism, and grade it 4.3 on a quality scale of 1 to 5 points.

The farm is not a member of any local or regional tourism association because they are not seen as effective or professional.

The farm employs one person on the farm, plus 4 people for the 6 months of the year that the accommodation is open, plus one or two 'Wwoofers' (WWOOF – World Wide Opportunities on Organic Farms: living, learning, sharing organic life styles[91]; McIntosh & Bannermann, 2006).

Total turnover has risen to around €250,000. Low profitability is a problem. In part that relates to the very short season for rural tourism in Sweden, especially where snow related tourism is not possible. To improve the financial situation, the owner is considering selling off the farm side of the enterprise, investing the proceeds in accommodation upgrades, and eco-energy works, letting the restaurant/cafe as a free standing operation, and opening an eco-art gallery specialising in wind sculptures.

Regulation and record keeping is seen as a time consuming/non-productive activity – a specific problem is the need under Swedish law to record and submit details of all hours worked by staff, payments made, etcetera, every 4 weeks. Bank loans are hard to get because rural tourism is not recognized as a viable business, and interest rates are high.

---

[91]   www.wwoof.org.

G5. Food Tourism: A Case Study from two Danish National Parks

There have been widely reported increases in tourism related to food, as visitors seek new, fresh and authentic food experiences (Boniface, 2003). Much of this has helped develop rural tourism in general and farm diversification in particular, with heritage foods being especially favoured (Sims, 2009). In Wales a visitor survey in the Brecon Beacons National Park found that 81% wanted to try local food products[92]. Farm shops, pick your own farms, farm and village restaurants, and direct food sales from farms have all benefited. Buying and consuming speciality food products are a lifestyle fashion (Germov & Williams, 2009); food is an integral part of leisure activities and social events for the educated middle class. Sims (2009) found that many local foods are considered iconic products: she also found links to the Slow Food movement. Rural food finding is responsible for countryside visits, with enjoyment coming from the purchase, the setting and the heritage and production stories linked to the products. Examples include microbreweries, salt works, cheese makers, ice cream makers, confectioneries, jam factories and bakeries, where visitors can see, smell, feel, learn about and taste the food before purchasing it (Tellström el al. 2006).

Hjalager & Johansen (in press) studied the intentions of farmers in the Danish National Parks of Skjern Ådal and Mols Bjerge, and obtained 126 usable interviews; 81% were interested in diversifying their agricultural production, 74% felt that there was a demand by visitors for direct food related events, 88% felt that there should be better interpretation of food production, while 46% felt that more rural cafes and restaurants were needed. About 60% were considering food tourism related developments, would be interested in training and information opportunities, and working in partnership to develop such businesses. Knowd (2006) provides a useful account of how a food tourism partnership works.

G6. Two examples of national rural / agri-tourism from new EU members

Latvian Country Tourism Association: a national case study[93].

The Latvian Country Tourism Association was founded between 1991 and 1993 in response to the profound political and economic changes of that period in Eastern and Central Europe. It was set up by a few like-minded people with experience of rural tourism in both Canada and the USA via the Latvian diaspora. They were assisted by Unto Palminkoski of Lomarengas, (Finland's rural tourism organization), Paul Richardson of Icelandic Country Holidays, and Klaus Ehrlich from EuroGites. It is an NGO with a trading arm. It is funded largely by its 300 members' fees and by its now extensive trading activities. It does not restrict itself to agri-tourism but covers the whole range of rural tourism activities. It offers:

- Creation of personalised packages for groups and individuals.

- Reservation of accommodation and related services: hotels, guest houses, manors, self-catering as well as farms.

- Booking of specialist guides and tour leaders.

- Car, bus, bike and boat hire.

- Luggage transfer between accommodations.

---

[92] www.peakdistrict.gov.uk.
[93] Asnate Ziemele, CEO of the organization, assisted in the development of this study.

- Publications, professional maps and route descriptions.

- Transportation for groups.

In addition it takes project and consultancy work, bringing its annual turnover to €400,000 and its employment to 9 full-time and 3 part-time people.

It is important to recognise the consultancy work done by the Association and the way in which it has disseminated the results of the work to all who use its web site. Working with ECEAT and EUROPARC Consulting GmbH on the EU Life+ Project POLPROP-NATURA (LIFE07 ENV/LV/000981) in Slītere National Park, it has produced a range of materials valuable worldwide, not just in Latvia[94].

In addition to the activities mentioned earlier, the Association provides a website[95], a range of marketing activities, training, advice, quality control and publications. They have regular and positive contacts with academic researchers, with Latvian government ministries and agencies, with other national rural tourism organizations in Europe, and with EuroGites. They have two future problems:

1. They need more tourists – Latvia is relatively remote and has a small home market.

2. They suffer from cheap internet booking agents creaming off potential members. The association believes very strongly in a holistic approach to rural development, and in increasing quality and sustainability: price competition comes from internet agents who do not have those long term approaches.

The Association of Tourist Farms of Slovenia[96]

The association was founded 1997. It unites 398 tourist farms across Slovenia with approximately 2,200 beds and seating for 11,000 guests in dining areas. It was formed following the bankruptcy of the leading tourist farm travel agency Vas. Farm leaders asked for the help of the Slovenian Agricultural Advisory service, and, using technical advice from Austrian Farm Holidays, created the association. Since 1997 occupancy levels have risen by 50%. Main activities include:

- Marketing and communication activities, including www.farmtourism.si.

- The linking of tourist farms.

- Representing the interests of members and all tourist farms in Slovenia.

- Informing and updating members.

- Organizing training courses.

- Assisting quality improvements, currently assessed on a 4 Apple scale, derived from Austrian Farm Holidays 4 Flower scale.

---

[94] http://www.celotajs.lv/cont/prof/proj/PolProp/PolProp_results_en.html.
[95] http://www.celotajs.lv.
[96] This case study was assisted by Vesna Čuček, the head of the Agricultural Advisory Service at the Agriculture and Forestry Institute in Celje, Slovenia.

- Projects dealing with developing quality, marketing cooperation, language skills, etcetera.

The association is financed from membership fees and funds for project work for the Ministry of Agriculture and the Environment. The basic membership fee is €50 per year per member and €100 for those presented on the two multi-language web portals[97]: It is a non-profit organization. Total income in 2011 was €77,040. Membership is restricted to farms. There are 7 farm tourism advisers paid for by the Farm Advisory Service.

The association has good links to University researchers and works closely with the Slovenian Tourist Board, the Ministry of Agriculture, Forestry and Food, the Ministry of the Economy, and the Regional Agriculture and Forestry Institutes. The Slovenian Tourist Board is especially supportive, covering 50% of the production costs of the promotional catalogues. Other links include rural/agri-tourism associations in Austria, Italy, Spain, UK, Latvia, and with EuroGites.

The association suffers competition from cheap internet marketing channels. Future hopes include better market research on consumers' expectations, more marketing activities including study tours for journalists, more PR articles and new channels for attracting consumers. These would all require additional funds. A key target is to raise occupancy rates from the current 75 days per year to 90 days per year. As in Latvia, the home market in Slovenia is not large; 55% of guests come from Slovenia, 15% from Germany, 12% from Italy, and 10% from Croatia.

---

[97]   www.farmtourism.si, www.slovenia.info/touristfarms.

ANNEX H: SOME FREQUENTLY ASKED QUESTIONS

Is Europe's special interest tourism Special?

In many ways, yes; not only is Europe the largest international tourism market (in part because of its many international boundaries), it is also the world's leading provider of rural tourism and industrial heritage tourism. That leading provider status owes much to Europe's geography, landscape history, and early industrial development.

Europe's complex geography and geology provides the very rich basis for many different landscapes within a relatively small land mass. Its political fragmentation and the historical circumstances that have given rise to so many small farms in some areas have also assisted the development of rural tourism. Small farms tend to diversify into tourism out of economic necessity much more than large more economically viable farms.

Europe's early industrialization has given it a large store of industrial heritage sites. Intensive canal construction began in the eighteenth century, especially in the UK. The railway network, the majority of it dating from the nineteenth century, is amongst the densest in the world. Coal mining and iron, steel and textile production was widespread by the mid to late nineteenth century: much of that infrastructure is now redundant, but valuable as heritage, and for heritage tourism.

Very little effort is made to attract non-European visitors to Europe to sample rural tourism and industrial heritage tourism. Regional agencies tend to think it inappropriate for them to seek non-European markets; national agencies tend to concentrate on well known iconic landmarks.

Are Industrial Heritage Tourism and Rural Tourism Sustainable?

It is often claimed that both the above are forms of sustainable tourism. The case can be put forward that both recycle assets – industrial and agricultural – and re-use them for tourism purposes, creating jobs and sustaining jobs and local communities. However, sustainable tourism is a much more complex question. Much depends on the detail and on the long-term impacts. Details include the mode of travel to destinations, and the distances travelled. There are questions of local ownership and especially of how much tourism spend leaks away from the destination to sometimes distant suppliers, especially from food, drink and souvenir purchases. Of greatest importance are the dangers of long term deleterious changes to natural environments, and specific ecosystems, to the character of destinations and its built environment, and the potential loss of local cultural traditions through the influence of tourism.

Barbieri (in press) surveyed 873 US farms with a diversified entrepreneurial portfolio, and found that agri-tourism farms approach sustainability to a greater extent than their counterparts, producing multiple environmental, socio-cultural and economic benefits for their farms, households and society. Results suggest that agri-tourism, compared with other farm entrepreneurial ventures, is more successful in increasing farm profits, creating jobs and conserving the natural and cultural heritage. For example, 52.4% of agri-tourism farms have been within the same family for at least two generations and 73.3% are willing to pass the farm on to their children, proportions that are significantly higher than other types of entrepreneurial farms. The results also show, however, that while many agri-

tourism farms practice integrated pest management, they do need to become much more engaged in other environmentally friendly and conservation practices.

Lane (1994) suggests the use of local/sub-regional sustainable tourism strategies, drawn up in full consultation with all stakeholders to determine areas of risk, set up zoning and other planning measures, including scale limits, to reduce risk, and the need to assess limits to acceptable change. That latter concept was pioneered by McCool (2001) and is increasingly regarded as more useful than the now outdated concept of carrying capacity. Beeton & Benfield (2003) examined the concept of de-marketing fragile areas and ecosystems, a technique used successfully in several protected areas. McGehee (in press) analyses the issues involved in the application of a sustainable tourism strategy to a large tract of the Blue Ridge Mountains in North Carolina USA.

The answer to the question is, therefore, that while neither industrial heritage tourism, nor rural tourism, is inherently damaging to the environment or to communities, management systems need to be in place to ensure that sustainability standards are achieved. The precautionary principle is an important one: the heritage involved is not replaceable (Fennell & Ebert, 2004).

Should there be Local Involvement in the development and operation of Industrial Heritage and Rural Tourism?

The answer to this question is yes – but the answer must be qualified.

Tourism is a very invasive activity. It cannot be hidden on an industrial estate. It changes the places that local people live, work, do their shopping and take their leisure. It can change the character of their communities. It is essential that local people are consulted, and their views are taken into account – and that tourism management systems are put in place to offset any problems raised.

However, tourism is a business misunderstood by many, and care must be taken not to react to unfounded fears that can be expressed by many people fearful of change of any kind.

On the positive side, local involvement is often necessary to make industrial heritage work well, because of the large number of volunteers required to make it work well. And local involvement is necessary in rural tourism because of the need to encourage new business start-ups in the accommodation field, in hospitality, and in the supply of local food and drink to the tourism market.

Will demand for industrial heritage and rural tourism be sustainable into the future?

This is a common question, especially amongst the older generation. There are few guaranteed futures in the modern world. Of the two types of special interest tourism, the future for industrial heritage tourism is the least easy to predict. There are four reasons for that:

1. Much – but not all - industrial heritage tourism is dependent on public sector funding, rendering it at risk in the current age of public sector expenditure reductions.

2. Much of the demand for industrial heritage tourism is based on the nostalgia market, based on visits from those who wish to reminisce or to show their own children or grandchildren the past. Those generations are inevitably short lived.

3. Much of the low season demand for heritage tourism of many kinds is based on educational visits, making attractions very dependent on the continuity of the school curriculum.

4. And finally, much of the industrial heritage that we have is expensive to repair, not least because much of it was not designed to have an indefinite life.

These points do not make industrial heritage tourism unsustainable: they do make it necessary to develop excellent relevant, and where possible hands-on, interpretation systems to add value to the heritage and create real experiences. Management skills and market awareness will be very important here. Paradoxically, one of the factors that could make industrial heritage sustainable is that so much of industrial heritage tourism is currently poorly developed and great improvements could be made by informed and skilled management. Industrial heritage has especially great opportunities because it can offer very relevant experiences *if* well interpreted.

Rural tourism seems set for a secure future, but *only* if it reacts to the growing competition from city tourism, cruise tourism, revitalised resorts *and* from the many new rural tourism regions now being developed. It is important to realise that the majority of the world is rural, bringing potentially heavy competition between regions, and especially from new entrants to the field.

There are several features in its favour:

- The growing interest in physical and mental health puts outdoor recreation such as walking, cross country skiing, climbing, and cycling into a potential growth position, although health is rarely used as a selling point.

- The fear of a world outbreak of obesity backs the above point.

- The media industry produces large numbers of nature related TV programmes which act as para–marketing systems.

- Rural tourism is closely linked to the growing area of food tourism.

- The concept of Second Generation Rural Tourism – see earlier at 5.2.5 - holds the promise of more professional, more effective rural tourism management.

- The on-going development of portable personal computing devices make navigation by car, cycle and on foot, through the countryside and especially through forest and across mountain, much easier.

EUROPEAN PARLIAMENT

DIRECTORATE-GENERAL FOR INTERNAL POLICIES

POLICY DEPARTMENT B
STRUCTURAL AND COHESION POLICIES

Role

The Policy Departments are research units that provide specialised advice
to committees, inter-parliamentary delegations and other parliamentary bodies.

Policy Areas

- 🟩 Agriculture and Rural Development
- 🟨 Culture and Education
- 🟦 Fisheries
- 🟧 Regional Development
- 🟥 Transport and Tourism

Documents

Visit the European Parliament website:
http://www.europarl.europa.eu/studies

PHOTO CREDIT: iStock International Inc., Photodisk, Phovoir

Publications Office