

D4.1: Report on scoping and analyzing the needs of tourists, public sector tourism bodies and the commercial tourism section



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D4.1: Report on scoping and analyzing the needs of tourists, public sector tourism bodies and the commercial tourism section

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1 Introduction

1.1 What is the research context?

This research has been commissioned by the Europeana Foundation, the governing body of the Europeana service, an online portal that acts as an interface to millions of books, paintings, films, museum objects and archival records that have been digitised throughout Europe. PP level: Restricted to other programme participants (including the Commission Services)

The research forms part of a wider programme of work, The Europeana Awareness programme, in which Culture24 is working with partners across Europe, to research and develop services that explore how the wealth of digital cultural content in Europeana, in combination with cultural venue and events data, might enrich the current information offer for cultural tourists. This programme is co-funded by the European Commission.

Culture 24 has collaborated with Plurio.net in undertaking this research

Culture24 is a cultural publishing organisation based in the UK, existing to support arts and heritage venues to reach audiences across digital platforms. As well as maintaining an online cultural venue and events listings database and publishing platform, Culture24 has also developed a strong expertise in leading research projects that exploring how arts and heritage venues engage with their audiences digitally.

Plurio.net is an organisation based in Luxembourg that collects and disseminates cultural venue and events information of the Greater Region (a cross border region in the heart of Western Europe).

1.2 What are the research objectives?

It is proposed that certain digital cultural content, namely:

- metadata and images relating to digitised collections via Europeana (“EUROPEANA DATA”)

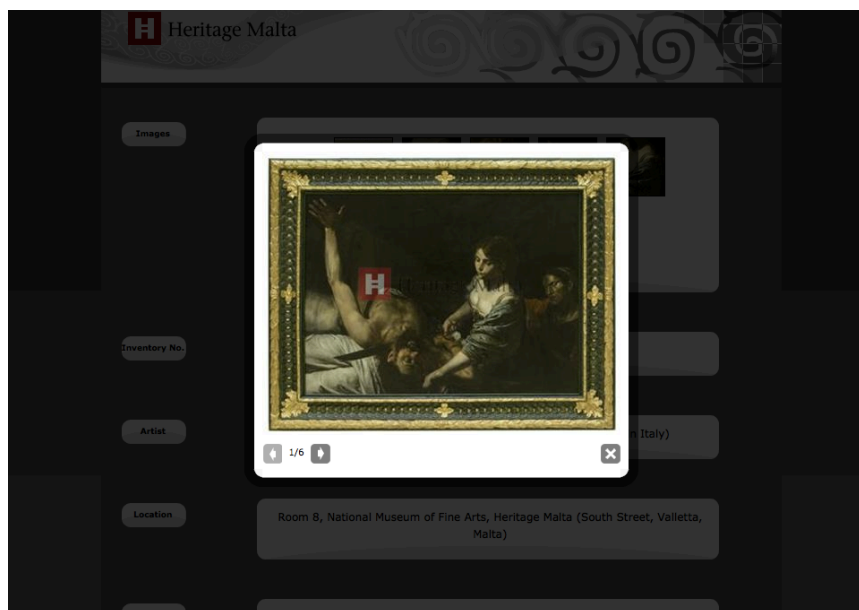
AND

- aggregated cultural venue and events information across Europe (“LISTINGS DATA”))

may be made accessible to the cultural tourist market by developing a service of this content to cultural tourists (“PROPOSED SERVICE”).

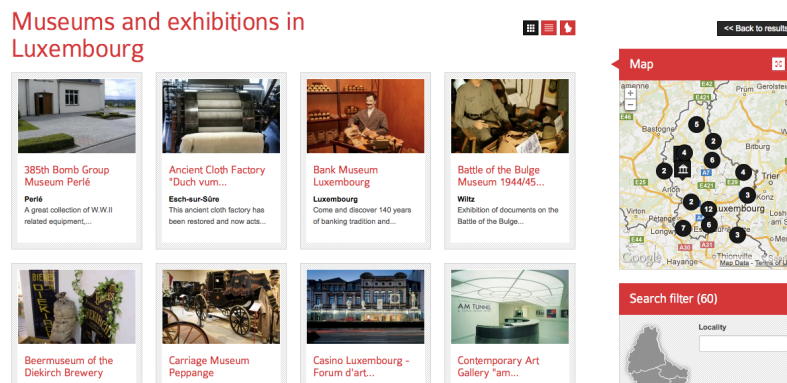
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For the purposes of definition, “digitised collections ” refers to the millions of books, paintings, films, museum objects and archival records that have been digitised by museums, libraries and archives and aggregated by Europeana.



“Cultural venue and events information” refers to specific venue and events data relating to museums, art galleries and various cultural heritage sites such as monuments, historic buildings, stately homes etc.

Museums and exhibitions in Luxembourg



To explore the viability of this Proposed Service further it is necessary to identify both the **strategic** and **content** driven challenges and opportunities being faced. (“content” in this respect relates to the demand and supply of information and data). In order to identify these current challenges and opportunities, the **user needs** of the current cultural tourist information market must be identified. An analysis of these user needs represents the fundamental objective of this research.

1.3 What type of needs analysis?

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A demand analysis

Of utmost importance is to develop a Proposed Service that is **necessary to the end user**. After all, if cultural tourists do not find such a service useful in meeting their own needs, this would render any such Proposed Service, however well designed and formulated, utterly redundant.

It is interesting to note that in both the development of services focusing on digitised collection libraries as well as within cultural tourism more generally, there has often been a failure to adequately analyse the needs of the ultimate end user, usually rendering such services as fundamentally inadequate. For example in an exploration of digital libraries' ability to engage the end user it was identified that "digital libraries are still being developed independently of the extensive involvement of their constituencies of use" and that "digitisation has been led by supply rather than demand. While end users are seen as a priority they are not directly consulted about which collections they would like to be made available digitally or why" (Birrel et al 2010: 2).

A similar issue appears to affect the development of cultural tourism services where supply rather than demand approaches are favoured with little engagement and understanding of the end user's behaviours or motivations:

from the literature analyses of cultural tourism and the cultural tourism market, it can be concluded that authors mostly deal with the topic cultural tourism and attractions/objects, with supply-led approaches and consider the cultural tourism market segment to be an undifferentiated market, whereas consumer behaviour, motivation, perceptions and their influences on the development of cultural sites and objects often receive less attention (Isaac 2008:25)

Also, the digital shift has signalled changes to the traditional 'top heavy' supply model of information, necessitating a greater emphasis on the end user. Because "the internet is essentially a 'pull' medium, it will become increasingly important to know more about the motivations and interests of consumer segments in order to draw attention to information posted on it" (ETC 2006)

Given that that the Proposed Service aims to overlap the digital collections and cultural tourism services, it is appropriate to draw upon this commentary to conclude that a **demand analysis** of end user needs is essential and is thus a primary objective of this needs analysis

A supply analysis

Whilst the desirability of shifting the focus of enquiry from supply to demand is clear, it should be noted that in the absence of the Proposed Service existing currently, there is a potential gap in knowledge about what the current supply considerations of such a Service would be. To enable this to take place it would be useful to undertake a further analysis of needs, this time focusing on users who are responsible for driving the information supply to cultural tourists currently.

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Undertaking such a **supply analysis** of needs is therefore a secondary objective of this research.

1.4 Who are the users?

Users have been identified within a hierarchy of importance to this study according to their particular roles within the proposed demand and supply process of the Proposed Service.

These users are as follows:

- Primary User = End User of Proposed Service
 - **The Cultural Tourist**
- Secondary Users = Potential Supply Partners in Proposed Service
 - **Commercial Tourism Publishers**
 - **Public Tourist Bodies**
- Tertiary Users = Key Stakeholders in Proposed Service
 - **Cultural Venue and Events Data Aggregators**
 - **Collection Holders**

1.5 What are the needs?

Given that this analysis seeks to identify both the strategic and content driven opportunities and challenges of any Proposed Service, it makes sense that the needs that are analysed should be both strategic and content/informational in nature for each user, where possible.

These needs will primarily focus on the current strategic and content/informational requirements of each user within existing processes and roles. These can be summarised as follows:

- Primary User
 - **The Cultural Tourist**
 - As the target market
 - As a user of content and information
- Secondary Users
 - **Commercial Tourism Publishers**
 - As existing publishers of content to cultural tourists
 - **Public Tourist Bodies**

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- As existing strategic drivers of cultural tourism
- As existing publishers of content to cultural tourists

- Tertiary Users
 - **Cultural Venue and Events Data Aggregators**
 - As potential suppliers of Listings Data within the Proposed Service

 - **Digitised Collection Holders**
 - As potential suppliers of collections content within the Proposed Service

These existing roles can be said to operate at either a strategic or content driven perspective (or both) and so will be used as the basis upon which to draw out the particular strategic or content driven needs.

1.6 What are the research questions?

The key research questions for this study relate to an exploration of each individual user's strategic and/or content driven needs in the context of the roles and type of analysis described above. These can be summarised as follows:

The Demand Analysis

- What is the proposed target market and target user of the Proposed Service?
 - Who are cultural tourists?
 - What are the target 'motivations' of cultural tourists?
 - What are the target consumer behaviours of cultural tourists?

- Can the Proposed Service pass useful content/information to the end user?
 - What are the information gathering and sharing behaviours of cultural tourists in connection with their trips?

The Existing Supply Analysis

- What can the Proposed Service learn from existing publishers of content to cultural tourists?
 - What are the current market trends impacting on tourism publishing?
 - How are existing publishers addressing these trends?

- What opportunities and challenges will the Proposed Service face when seeking to work with Public Tourist Bodies as strategic drivers of cultural tourism?

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- How do Public Tourist Bodies currently articulate their cultural tourism strategies?

The Proposed Supply Analysis

- What are the key data requirements within the Proposed Service?
 - What are the data requirements for Cultural Venue and Events Data Aggregators?
 - What are the data requirements for Digitised Collections Holders?

1.7 What is the research scope?

Geography

It is impossible to look at each element of this research in the context of the EU as a whole or for each individual country within the EU. Therefore unless specific information in his context is available, information is either not geographically specific or focuses specifically on the UK countries that make up the Greater Region (Germany, France, Belgium and Luxembourg) on the basis that this is the information most accessible to Culture24 and Plurio.net

Information Gathering and Sharing Behaviours

Any behaviours in connection with booking trips have been specifically excluded from analysis, as this study believes that this falls outside of the scope of behaviours that would respond to the Proposed Service.

Also, any focus on information exchange at cultural venues, for example in the form exhibition interpretation, is excluded from scope on the basis that this doesn't relate wholly to tourism information.

Existing Supply Analysis

Precise technical detail is out of scope of this research as the number and types of technical systems involved are too high and speed of development risks any findings becoming outdated immediately.'

2 What are the findings?

2.1 The key findings

The Proposed Service must take account of the following findings:

- 1. The specific and detailed needs of target end users are fundamental considerations when planning any digital service.
- 2. Cultural Tourism is a very difficult concept to pin down, encompassing as it does a broad range of interpretation and definitions. Taking ownership of a clear definition for a target cultural tourist market is essential.
- 3. The target market definition should be based on user motivations and behaviours rather than defined 'profile types' .
- 4. Three key target motivations of cultural tourists are 'purposeful', 'sightseeing' and 'serendipitous'.
- 5. Five key target behaviours of cultural tourists are 'city breakers', 'special interest travellers', 'day-trippers', and those relating to 'over 55s' and 'under 30s'.
- 6. Public Tourist Bodies often lack a content-driven cultural tourism strategy. There is opportunity for the Proposed Service to collaborate with Public Tourist Bodies at a strategic level.
- 7. The digital information-seeking behaviours of cultural tourists are changing rapidly and any Proposed Service must be adaptable in order to serve these changing demands.
- 8. Mobile technologies and usage are developing and growing rapidly.
- 9. Cultural tourists need cultural venue and events listings information that is up-to-date, local, niche, tailored to their requirements, easily discoverable and easily navigable.
- 10. Whilst there is some awareness currently of digitised collections information from cultural tourists, there is little usage of or engagement with it currently.
- 11. Cultural tourists need information both before and during their trips..
- 12. 'SOLOMO' - Social Local and Mobile convergence is a strong influence on digital publishing platforms..

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- 13. Commercial publishers such as TripAdvisor, Rough Guides and Lonely Planet do not currently provide cultural event listings, there is significant opportunity to engage them in this area.
- 14. TripAdvisor currently has very little editorial content and may increasingly seek such content as a way to address the trust issues that its user generated content model currently faces.
- 15. There are clear and set requirements around the types, quality and breadth of venue, listings and collections data required by aggregators and publishers in order to establish a successful service for cultural tourists.
- 16. Collection holders will have their own separate requirements of any Proposed Service, these must be considered at all stages.

2.2 Recommendations for further research

- Detailed investigation as to how cultural tourists are specifically using mobile technologies to gather and share information.
- Detailed investigation as to how cultural tourists use information for inspiration in choosing destinations, rather than for specific planning.
- Detailed user testing exploring specific ways in which digital collections and listings content may be used by cultural tourists.
- An analysis of what metrics can be tracked on behalf of collection holders and venues once the Proposed Service is established, including research into exactly what information is useful and what is possible to track.

3 The Methodology

The research methodology for this user needs analysis adopts a combination of Literature Review, User Surveys and Case Studies.

3.1 Literature Review

3.1.1 Objectives

Literature Review is used as the primary research approach to draw upon the key themes and trends impacting on each of the research questions.

3.1.2 Sources

For the Demand Analysis, literature from 3 main sources is explored. These are as follows:

- Cultural tourism texts: specifically relating to conceptual issues, market trends and user studies
- General tourism texts: again specifically relating to conceptual issues, market trends and user studies
- E tourism texts: specifically relating to market trends and user studies.

For the Existing Supply Analysis, literature is primarily sourced from 2 bodies of literature, namely:

- General digital publishing texts: specifically related to market trends
- E Tourism texts: specifically relating to market trends

Within this Demand Analysis, literature from 3 sources is explored, namely Tourism texts, Cultural Tourism texts and E Tourism texts. Within these sources, texts that explore motivations, market trends and user studies are particularly focused on.

3.1.3 Advantage and limitations

Literature review provides a very broad contextual and conceptual layer to the User Needs Analysis, which is essential given the fact that this is a potential new market and so previous experience in this area cannot be drawn upon.

3.2 User Surveys

3.2.1 Objectives

User surveys were conducted by this study (“User Surveys”) to explore the information gathering and sharing behaviours of cultural tourists

3.2.2 Sources/Process

100 user surveys were conducted in total. 54 of these were conducted within the UK and the remainder were conducted within various locations within the Greater Region.

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The surveys were conducted either with visitors at specific cultural venues or with nominated people over the phone. 59 were conducted in the former category and 41 in the latter. The sets of questions for each these groups varied slightly in some categories to reflect both their slightly different circumstances and the ability to ask a longer set of questions whilst conducting the survey over the phone.

The surveys in the Greater Region were conducted either in French, German, or Luxembourgish and the responses were translated back to English for the purposes of analysis and comparison.

A logical and considered methodology was followed within the survey design, based on Culture24 and Plurio.net's previous experience in this area. The specifics of this approach are explained within Chapter 5.

3.2.3 Advantages and Limitations

It is acknowledged that the sample size of User Surveys is not large enough to infer conclusive outcomes. To do this a completed sample size of almost ten times might have been required which was impossible due to resourcing constraints.

Undertaking these User Surveys manually as opposed to via web or email, ensured that that completion rate was almost 100% ensuring in turn that data quality was excellent. It was decided that data quality should be prioritised over sample size, given that User Surveys were not the only research method, and were supported by surveys identified within the literature that had far larger samples.

Other accepted limitations of the User Surveys include potential errors derived from the translations from and to English and potential cultural/nationality driven differences within the survey responses that could not be identified.

3.3 Case Studies

3.3.1 Objectives

The Case Study methodology was used within the Supply Analysis to explore the needs of Public Tourism Bodies, Commercial Publishers and Cultural Venue/Events Aggregators and seeks to complement the literature review in these areas.

3.3.2 Sources/Process

Selection of case studies was made based on ease of ability to research and relevance within the user group or for the cultural tourist market. The choice of each case study is explained in more detail at the beginning of Chapters 6 and 7.

The case studies have been conducted through a combination of relevant desk based research and/or interviews with relevant contacts within each case (either face-to-face or via telephone)

3.3.3 Advantage and Limitations

Other Europeana Awareness research is currently exploring the breadth of supply for Cultural Tourism, and as such it was recognised that for this supply analysis, depth rather than breadth was a better approach. Focusing on case studies enables this to

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happen. As such any opportunities and challenges that can be drawn from this analysis are intended to be indicative rather than conclusive.

4 The Demand Analysis (Part 1) – The Strategic Demand

4.1 Introduction

An end user demand analysis is performed in order for the Proposed Service to identify any opportunities and challenges when seeking to understand its target market. In order to do this, three fundamental questions are asked:

- Who are Cultural Tourists?
- What are the motivations of Cultural Tourists?
- What are the consumer behaviours of Cultural Tourists?

4.2 Who are Cultural Tourists?

Definitional challenges

To understand who is a cultural tourist, an understanding must be reached as to what is cultural tourism. “Cultural Tourism” is an expression that is quite usually exchanged in common parlance but in reality is extremely difficult to define. For example Richards points out that “one of the few areas of certainty in cultural tourism is the difficulty of defining it”. (Richards 1996:45) and McKercher and Du Cros responded to the question “ what is cultural tourism?” by indicating “this seemingly simple question is actually very difficult to answer because there are as many definitions of cultural tourism as there are cultural tourists” (McKercher and Du Cros 2002) According to the International Council on Monuments and Sites “cultural tourism as a name means many things to many people and herein lies its strengths and weaknesses” (ICOMOS 1996:17).

Isaac identifies the definitional difficulty as due to the “broad meaning of the terms ‘culture’ and ‘tourism’” as well as “the changing role of cultural tourism itself” (Isaac 2008: 4). A key problem is what is defined as culture. As Raymond Williams famously noted “culture is one of the two or three most complicated words in the English language” (Williams 1983). Culture in respect of tourism can be interpreted as narrowly as visiting and engaging with the arts, museums etc or as widely as the local habits, customs, dress, food etc of a place. It is also increasingly seen to include elements of popular culture, for example tourism associated with the Beatles is estimated to account for 600,000 visits to Liverpool a year, with these visitors spending some £20 million in the local economy (European Council 2011). Because all tourism activities involve some element of culture, whether it be a visit to a specific cultural site or event, or simply soaking up the ‘atmosphere’ of a destination from a pavement café, there is a temptation to see almost all tourism as ‘cultural tourism’ (European Council 2011).

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Seeking to reach out to “cultural tourists” is therefore fraught with conceptual and definitional challenges. It is important to recognise and confront these complications instead of simply ignoring them and assuming a common understanding. Yet, at the same time, it is also important to place a stake in the ground and propose a definition that can work for the particular objectives of the Proposed Service

A proposed definition

Various reviews of the existing definitions of cultural tourism provide a whole range of possibilities. However two basic definitional categories, which many subsequent definitions still fall into, can be gleaned from a review of the literature. Examples of both of these can be seen in the work of the European Association for Tourism and Leisure Education (ATLAS).

The first of these are **motivational** based definitions which attempt to describe the motives and meanings attached to cultural tourism as an activity. The ATLAS example of this type is: “the movement of persons to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs”.

The second are **product** based definitions of cultural tourism that focus on the types of cultural venues visited by tourists and can be considered necessary for the measurement of the cultural tourist market. The ATLAS example of this type is: “all movement of persons to specific cultural attractions, such as heritage sites, artistic and cultural manifestations, arts and drama outside their normal place of residence”.

It is proposed that the definition used for cultural tourism by this study should seek to incorporate aspects of both definitions. This is because both can be used as a basis upon which to explore needs from an end user perspective. On the one hand the motivational based definition allows exploration of the **motivational needs** that drive cultural tourists, and on the other hand the product based definition allows exploration of the **consumption behaviours** of the cultural tourist.

Given that the Proposed Service specifically relates to cultural content primarily sourced or related to museums, art galleries and a range of cultural heritage sites, it is proposed that for the purposes of this study “cultural venues” are assumed to only include these.

The proposed definition of cultural tourism for this study therefore combines both ATLAS definitions and our definition of cultural venues. It is:

*“The movement of persons away from their normal place of residence **as visitors to specific cultural attractions** such as heritage sites, museums and art galleries, with the intention to gather new information and experiences to satisfy their **cultural motivations**”*

The strategic needs of cultural tourists can therefore be analysed in terms of motivations and behaviours. The 2 key questions to explore as part of this strategic demand analysis are therefore:

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- What are the motivations of cultural tourists?
- What are the consumption behaviours of cultural tourists?

Conclusions from each can then be drawn relating to the target motivations and consumption behaviours of cultural tourists for the Proposed Service.

4.3 What are the motivations of cultural tourists?

The literature exploring tourist/cultural tourist motivation can be mapped into two broad groups for further analysis. These can be defined for the purposes of this study as the 'classic' motivation and the 'postmodern' motivation.

Each is looked at in turn in the context of both general tourism and specifically cultural tourism.

4.3.1 The 'classic' motivation

Relating to tourism generally

This discussion stems from a notion that tourism motivation can be socially determined and involve standardised extrinsic motivations formed by the tourist's social environment (Heitmann 2011:43). From a tourism perspective this is evidenced as far back as the 17th century in the form of the Grand Tour where upper class men, responding to the social norms of class and custom, took a standard itinerary trip throughout Europe visiting many of its cultural sites and cities. Whilst essentially a rite of passage for an elite few, the Grand Tour also responded to the very prevalent learning and enlightenment motivations of that age. Whilst very different in scale, the standardised element of the Grand Tour can also be seen in the advent of mass market forms of travel since the 1960s, which were driven by similarly rigid (all be it different) motivations - the desire to escape - and similarly adhered to standardised forms.

Relating to cultural tourism specifically

Elements of these classic tourism motivations can be seen from a more modern Cultural Tourist motivational perspective within the literature, in the form of what this study will refer to as "Culture Vultures" and "Cultural Sightseers". The former refers to people who are highly motivated to travel to specifically visit museums, art galleries and cultural heritage sites. The primary motivator for visiting such sites

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would be to advance their own cultural knowledge and learning. Whilst not an example of mass standardised travel, it could be argued that socially derived needs in the form of cultural capital, class and education are prevalent in their motivations. This standardised element can be seen in the “Cultural Sightseer”, the individual who is motivated to travel to visit the ‘must see’ cultural monuments and sites in any area, with the specific motivation to tick them off.

4.3.2 The ‘postmodern’ motivation

Relating to tourism generally

The postmodern motivation stems from a notion of tourism motivation that can be considered from a more intrinsic perspective that allows for individualised differences (Heitmann 2011:43). This is reflected in the shift away from standardised mass market supply driven principles to more consumer orientated ones. In line with this, tourism motivations could be said to have similarly shifted from the external and standardised classic motivations of tourists to broader and more personalised sets of wants and needs based on meaning and purpose and are driven by a more personal desire of ‘becoming rather than being through tourism’ (Prentice 2008: 275).

This has led to the movement away from mass tourism towards the development of niche tourism which according to Novelli “is widely acknowledged as a major trajectory in contemporary tourism” and which “is a response to consumer needs, as a way of allowing the...expression of identity through specific activities that also overlap with other consumer preferences” (Novelli 2005:7).

Aligned with this is also an emphasis not only on motivation to travel and visit but also the motivation to experience. Tourism services have sought to respond to this shift by focusing on the promotion of experiential holidays such as sports or adventure based holidays. For example Croatia with its plentiful rivers, mountains and coastline has become a magnet for holidays offering kayaking, sailing, rafting and scuba diving based activities (Epicadventurer.com 2012). In addition there are a whole host of other motivations that can impact on the modern day tourist, not all of them deeply rooted in a desire for self-meaning, purpose or experience but indeed perhaps instead for simple leisure, relaxation and the sun.

Relating to cultural tourism specifically

The cultural tourism related literature also demonstrates the shift from classic to postmodern motivation. The British Tourist Authority calculated that two-thirds of tourists in the UK who do not take a culturally specific holiday still visit a museum during their holiday, indicating that “the distinction between people who consider

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themselves ‘cultural tourists’ and those who do not specify a particular interest in the arts or cultural tourism are blurring” (BTA 2002:4). Similarly in Hong Kong about a third of international tourists visit a cultural attraction or event during their stay but only 10% of tourists indicated that culture had played an important role in their decision to visit Hong Kong (Richards 2003).

Such visits to cultural attractions during holidays could have been motivated by a whole host of reasons. This is backed up by the most recent ATLAS survey on cultural tourism where experiencing the atmosphere, the presence of lots of interesting things and being a relaxing place all relegated the classic cultural tourism motivation of learning to last place (Richards 2007). A further interesting point from the survey was the rise of ‘busman’s cultural tourism’ where people working in jobs connected to the cultural sector tend to engage in cultural tourism more frequently. The recent ATLAS surveys also identified that 30% of cultural tourists have an occupation connected with culture (Richards 2007). This would suggest that professional motivations might also play a large role behind cultural tourism.

It is also pertinent to note that not all cultural consumption by tourists is stimulated by particular and deep individual motivations – many trips to cultural events and attractions may have culture as a secondary objective or as no objective at all. For example if it rains, sun and sand tourists may forsake the beach for the museum; tourists on a city break may stumble across a monument during an exploratory walk. What is of relevance from a cultural tourism perspective is not the lack of a specific motivation (of whatever kind) for visiting the site but the depth of experience they derived from it. Arguably the beach tourist who ended up in a museum and was emotionally moved by seeing a particular object is just as important a cultural tourist as the person who travelled particularly to see it. Such tourists could be deemed to be ‘serendipitous’ cultural tourists.

The particular nature of the experience could be wide ranging. It could relate to an experience of a particular art work or object or alternatively and as noted in the ATLAS survey results above, may simply relate to a venue’s overall atmosphere and it being a relaxing place. As such it could also relate to the nature of incidental experiences derived from these places. As Richards indicates ‘it seems that cultural tourism is becoming an experiential product, in which the visit is judged in terms of all attributes of the attraction and not just its cultural value’ (Richards 2003).

This broadening out of cultural motivations for travel appears to be increasing as a result of the postmodern fragmentation impacting cultural tourism discussed earlier. Therefore in place of a ‘mass market’ for cultural tourism, the literature points to an increasingly broad range of cultural tourism niches or special interests (e.g. gardening, industry etc) relating to specific facets of culture that appeal to tourists. Many of these are better explored in the context of consumption behaviours of

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tourists and so are discussed in the next section. However for the purposes of the motivation discussion here it is necessary to point out that another motivation type seen in connection to cultural tourism is what this study will refer to as 'Special Interest' motivation.

4.3.3 Conclusions/interpretations on the target motivations of cultural tourists

4.3.3.1 Conclusions

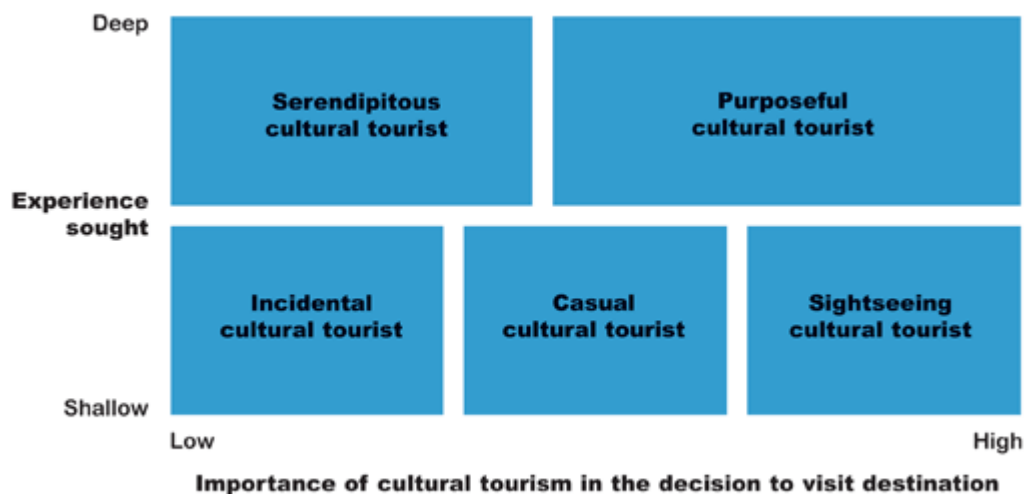
From the discussion above certain conclusions can be drawn about the motivations for cultural tourists

- A broad range of motivations can bring people into contact with culture when they travel.
- These can include:
 - the 'classic' motivations of "Culture Vultures" and "Cultural Sightseers" as well as -
 - the 'postmodern' motivations that are linked to expressions of individual identity, quests for meaning, special interests and so on
- What is important from a cultural tourist perspective is not what the motivation is but rather that it represents a strong desire to engage
- There are also times where motivation is not important (because someone "serendipitously" engages with culture whilst on their travels), but ends up having a very rewarding and rich experience.
- In these cases what is important from a cultural tourist perspective is not what the experience is, but rather that it has some value to them

4.3.3.2 Interpretations

- The McKercher and Du Cross types provide a good way to analyse this by comparing motivation (horizontal) against experience (vertical)

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(McKercher and Du Cross 2002)

- It is proposed that the horizontal description is amended to 'motivation to visit cultural sites during travels' (as this allows for a whole range of reasons that brought someone to the venue) and the vertical description is amended to "experience sought or gained" (as this allows for surprise experiences)
- This provides a useful tool by which to understand when the motivations of cultural tourists become relevant to the Proposed Service.
- Based on this discussion, it is suggested that the **Purposeful, Serendipitous** and **Sightseeing** motivation types are relevant to the Proposed Service from a strategic perspective as these types reflect deep motivations or deep experiences
- Those with deep motivations (Purposeful or Sightseers) could include those displaying the 'classic' motivations of "**Culture Vultures**", "**Cultural Sightseers**" and those displaying any other 'postmodern' type motivations such as "**Special Interest Tourists**". But target motivations are not limited to these alone.

4.4 What are the consumption behaviours of cultural tourists?

This analysis is predominately based on measurable user studies and statistics that explore cultural tourism from the perspective of visitation to cultural venues. The key trends that can be drawn from this literature are detailed below.

4.4.1 Importance of visits to cultural venues in Europe

It is clear that Europe is an important cultural tourism destination containing a large number of cultural heritage sites, museums, art galleries etc, particularly in its cities, and attracting a large number of international and domestic visitors (no matter how they were motivated to visit). It is estimated that cultural tourism (as defined by visits to cultural venues by tourists), accounts for approximately 40% of all European tourism (European Commission 2012).

4.4.2 Continued popularity of museums and cultural heritage sites

Whilst tourists may be becoming more omnivorous in their cultural consumption patterns (Richards 2003) heritage still retains a dominant role within the consumption patterns of cultural tourists. The most recent ATLAS survey showed that in terms of the types of cultural sites and attractions visited, museums, historic sites and monuments were the most important. Cultural events, such as concerts and dance performances are visited by relatively few tourists (Richards 2007).

4.4.3 Rise of city breaks

There has been a continued growth in short break city trips. In 2011 Europeans took 10% more city trips than in the previous year (European Commission 2012). A 2005 study by the Europeana Travel Commission found that 'culture is the single most important motivation for city trips, although relatively few visitors view themselves as cultural tourists'. This would appear to concur with the discussion earlier relating to a movement away from traditional cultural tourism motivations.

The study also found that cultural tourism in cities was an activity followed by all age groups, but with the peak age group in terms of participation lying between 20 and 30. It is proposed that younger travellers to cities tend to engage with a broad range of cultural forms and embrace cities such as Amsterdam or Barcelona that have a cultural 'coolness' or promote certain subcultures. Those over the age of 50 however were still active cultural tourists in a more traditional sense and were likely to visit more cultural venues and sites on average than younger tourists (ETC 2005).

4.4.4 Relevant demographic trends

Given that the over 50s and the under 30s appear to be active in respect of cultural tourism in cities, it is appropriate to explore demographic trends to assess if this may continue. A key demographic trend is an ageing society. It is predicted that in 2020 the elderly will be in the majority in Western Europe (Gottlieb Duttweiler 2006) It is proposed by a lot of the literature that within this group there is a large section with

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high travel participation due to high disposable income and more free time (Beioley 2001) and the prediction is that the group of potential travellers older than 55 will grow significantly (ETC 2005: IX). Indeed a recent study found that that 40% of all long-haul trips in 2010 were taken by 45-64 year-olds and that 28% of over 65s took at least two foreign holidays a year compared to just 19% of all British holidaymakers (Travelsphere 2012)

Given the perceived cultural tourism activity of this group, these trends clearly present this group as a potential target market for the Proposed Service. However it is relevant to also point out that that many in this group may not be as affluent as once thought, with wealth limited by past divorce, second families, children staying at home much longer than in the past and the possible need to support aged parents as the state retreats (Ryan 2010:16). This may affect their potential future participation in cultural tourism as normal patterns of travel decrease due to decreasing levels of disposable income.

Studies also show that 18 to 34 year olds are more likely to travel than other age groups (PhoCusWright 2011) and much has been written about the growing impact of 'Generation Y' (under 30s) on travel (Benckendorff 2009). Confirming the ETC data mentioned earlier, the most recent ATLAS survey found that the largest single age group of visitors to cultural sites was 20 to 29 year olds who accounted for over 30% of the visitors (Richards 2007) and so their relevance as a potential target market for cultural tourism is clear. However, similar to the older group, this potential must be tempered with a possibility that they may well travel less frequently in the future due to a combination of income uncertainties, reducing leisure time for holidays and increased competition from other leisure and entertainment sources. (Ryan 2010:16)

4.4.5 Growing demand for shorter, more local and more frequent holidays

Another growing trend is an increase in travelling closer to home, for less time and more often. About 36% of the 2002 ATLAS survey respondents of cultural tourists lived in the local area, and less than one third were from abroad (the 2007 survey did not measure this) (Richards 2003). Also the increase in city breaks over the last few years has been connected to an increased domestic demand (ETC 2005). From an EU perspective, a majority (56%) of EU respondents who went on holiday in 2011 did so in their own country (EC 2012).

Aligned with this increase in local travel is an increase in shorter, but more frequent, trips being taken. In 2011 the number of short trips taken by Europeans with one to three overnight stays rose by 10% compared to the previous year while figures for longer stays stagnated. Also the total number of trips taken by Europeans rose 4% from January to August of 2012 indicating more frequent travel. There is also evidence of a large increase in day visits, at least on an individual country level (ITB 2012). For the period January to August 2012, the number of day visits to Great Britain increased by 11% compared to the same period last year (Visit England 2012a)

4.4.6 Growth of special interest (niche) travel

This was mentioned in the last section, with reference to Special Interest motivation. However it is also included here as it refers to the growing importance of a range of venues that are attracting visits from cultural tourists and so responding to their consumption behaviours. The key special interest trends can be classified as follows:

Creative Tourism

This has manifested itself in an increase in creative courses targeted at tourists in areas such as gastronomy, photography and art as well as in the tourism strategies of cities such as Paris (creativeparis 2012). Very much linked to the desire for meaning and experience in culture and travel, this has been defined as “tourism which offers visitors the opportunity to develop their creative potential through active participation in courses and learning experience which are characteristic of the holiday destination where they are undertaken” (Richards and Wilson 2006) . This has come about from a scarcity of leisure time as people choose to develop their skills whilst experiencing local culture at the same time.

Creative Tourism is one of the most emphasised niche travel trends within the literature. Some commentators even go as far as to say that cultural tourism should be referred to as Creative Tourism now (European Council 2011). However this form of participatory tourism may present a challenge for the Proposed Service, as arguably those people who are likely to be driven by active participatory holidays are less likely to want to engage with collections content.

Dark Tourism

The concept of Dark Tourism has become increasingly known amongst academics interested in tourism over the last few years. It has been defined as “the act of travel and visitation to sites, attractions and exhibitions which have real or recreated death, suffering or the seemingly macabre as the main theme” (Lennon & Foley 2004). Academic research in this area has focussed upon a broad realm of ‘dark tourism’, with an emphasis upon the increasing importance to tourism of memory sites (i.e. battlefields/disaster locations/holocaust sites), military sites, slavery-heritage sites, prisons, cemeteries and 'macabre-themed' visitor attractions (Institute for Dark Tourism Research 2012).

Despite being the subject of much academic research and debate as to the exact nature of Dark Tourism, it appears that it is yet to have been picked up by the tourism industry as a niche market perhaps due to inability to pin it down (Werdler 2010). Therefore attempting to engage with the Dark Tourist as a potential target user for the Proposed Service could throw up a range of definitional and conceptual challenges. Instead, given the increasing importance to tourism of sites of memory/battlefields etc, it may be better to focus on people who have an interest in

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military history or WW1 as the special interest behind visiting these sites rather than the Dark Tourist.

Industrial Tourism

Industrial tourism relating to the act of travel to visit various industrial heritage sites has been increasingly popular in Europe in recent years as represented by the 2011 edition of European Tourism Day organised by the Commission which focused on industrial tourism. (Tourism Around Europe 2011) It has largely manifested itself on reinvigorating industrial ruins as a sustainable opportunity for tourism development. A whole host of sites, from power stations to distilleries to chocolate manufacturers are opening their doors to tourists.

Gardening Tourism

This is not necessarily a new niche as the literature points to discussions about the 'gardening tourism market' for the last fifteen years. However it does appear to have received increasing global profile recently through the development of a range of tourism offers to tap into this perceived interest. For example the world's leading horticultural exposition has just finished in the Netherlands and attracted two million visitors. Other garden festivals are also springing up all over the world. In the Loire Valley, the festival at Chaumont-sur-Loire is being celebrated currently as well as the Journées des Plantes festival biannual garden festival (Packe 2012) Whilst in the UK the 'English Garden' recently won the award for Outstanding Contribution to Tourism at the Visit England Awards for Excellence 2012 (Visit England 2012b) and The Royal Horticultural Society which plans to launch a range of garden holidays for 2013.

4.4.7 Conclusions - target consumption behaviours of cultural tourists

Certain key conclusions can be drawn from the discussion above about the target consumption behaviours of cultural tourists when considered in connection to the Proposed Service.

- Exploring cultural tourism from the perspective of visits to cultural heritage sites and museums is still relevant due to the popularity of such sites and their propensity within Europe
- City break visits should be a key focus, again due to their relevance to Europe, their popularity and their connection to cultural tourism
- Target over 55s and under 30s due to their likelihood of visiting cultural venues and also going city breaks
- Don't preclude local travel and day trips as they are becoming increasingly popular

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- Focus on special interest travel relating to Industrial Heritage, Gardening and World War 1, as all have relevance to a range of cultural venues within Europe and Europeana Data.

4.5 Conclusions: Who is the target cultural tourist?

Based on the conclusions of the target motivations and consumption behaviours of cultural tourists covered in the last sections, we propose the following user profiles of potential target cultural tourists:

- Culture Vulture City Break Tourist
 - Visits cultural heritage sites
 - Over 55
 - “Classic” cultural tourist motivation
 - Purposeful
 - Goes on city breaks
- Cool City Break Tourist
 - Visits cultural heritage sites
 - Under 30 (Generation Y)
 - Serendipitous
 - Goes on city breaks
- Special Interest Tourist
 - Visits cultural heritage sites
 - Purposeful
 - Motivated to travel by deep niche interest in any of the following:
 - Industrial heritage
 - Gardening
 - WW1
- Family Sightseer
 - Visits cultural heritage sites
 - Sightseer
 - Has children under 10 and takes them on trips
 - Tends to travel domestically and on day trips

It is important to note that these profiles are based primarily on behaviours and motivations (with the exception of the factors based on age and children). As such they describe generic ‘roles’ rather than exact types of tourists. One person may well display elements of all these different roles according to the circumstances, “the tourist can adopt different roles dependent on their whims, the people they are with, the depth of their wallets and their energy” (Ryan 2010:10). Of relevance therefore to the Proposed Service is not to target people who fit these profiles but rather the behaviours and motivations that underpin them.

5 The Demand Analysis (Part 2) – The Content Demand

5.1 Introduction

Once the cultural tourist target market can be identified, the second stage of the demand analysis seeks to understand how cultural tourists **engage** with the content/information.

But engagement is another slippery term. How should it be defined for these purposes? Locke argues that the way we engage with information has changed drastically since the arrival of the Internet, from a linear structured form of engagement to a more networked dispersed form. He therefore points out that “one way to define engagement is by the changing behaviours of our audience” and that “if you want engagement ...design for behaviours” (Locke 2012).

Applying this to the context of this analysis, we arrive at one key question when seeking to identify how to engage cultural tourists with information from the Proposed Service.

- What are the changing information behaviours of Cultural Tourists in connections with their trips?

5.1.1 The Literature

There is a wealth of literature that seeks to explore these information behaviours for tourists, mainly centring on tourist consumer use of travel information as well as certain E-Tourism literature. There is however little focus within the literature specifically on the information behaviours of cultural tourists. It is fair to say that despite the definitional issues discussed in the last chapter, cultural tourists do certainly form a subset of tourists more generally, and so an analysis of the information behaviours of the existing literature in connection to tourists is appropriate, especially given the lack of available information focusing on cultural tourists in these areas

To improve the relevance of this analysis to the Proposed Service it will, where possible, focus on literature relating to EU tourism or EU tourists and also literature focusing on the information behaviours of tourists from UK, Germany and France (as they relate to the three major European tourism markets and have overlaps with the UK and Greater Region focus of this study detailed earlier). Where there is some literature that can be related to the information behaviours of cultural tourists, this will be drawn upon.

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5.1.2 The User Surveys

The User Surveys run as part of this study do seek to focus on the information behaviours of cultural tourists specifically. They are analysed, alongside any literature that may refer to focus cultural tourists specifically, to provide indicative data from a cultural tourist perspective. This is used to compare and contrast with the broader tourist literature analysis to get a more comprehensive picture of the changing information behaviours of cultural tourists.

It is appropriate here to briefly discuss the specific methodology that was used to identify respondents, ways in which the study evaluated and categorised them and what indicators were used to analyse the results.

Identifying target respondents

It was appropriate for the purposes of the Proposed Service to seek to identify respondents based on the target user profiles indicated in the last chapter. However as has already been discussed it is impossible to simply target people who fit these profiles, we must instead target the behaviours and motivations underpinning these profiles. With this in mind the following approaches were adopted when seeking to identify target respondents:

- Identify some respondents who were over 55 or under 30
- Identify respondents with young families
- For phone surveys identify in advance those who tend to visit cultural heritage sites
- Run surveys with visitors at cultural heritage sites
- Run surveys at cultural sites in cities.
- Run surveys at cultural sites likely to attract special interest tourists in the categories described within the profiles.

Evaluating target respondents

The fact that the profiles refer to a combination of behaviours and motivations rather than specific people means that it is also difficult to evaluate exactly which profiles were engaged with during the survey. However, certain key indicators of target behaviours and motivations can be evaluated based on the question design. These are

- Age
 - May indicate “Culture Vulture” profile (if over 55) or “Cool City Break” profile (under 30)
- Family travel
 - Identified through asking about whether majority of travel is with young family
 - May indicate “Family Sightseer” profile
- Special interest travel

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- Identified through asking about the usual tendency to visit venues to pursue a special interest
- May indicate “Special Interest” profile
- Motivation type (I.e. Purposeful, Serendipitous or Sightseer)
 - Identified through asking about the usual depth of motivation and depth of experience when visiting cultural venues
 - May indicate any of the 3 profiles (based on McKercher and Du Cross methodology discussed in last chapter)

Breakdown of respondent categories:

- Under 30 (Generation Y) = 27 respondents
- Over 55 = 21 respondents
- Family sightseer = 8 respondents
- Special interest = 60 respondents
- Purposeful = 48
- Serendipitous = 30
- General Sightseer = 1.

(The average age of the Purposeful motivation type was 45 and the Serendipitous profile type was 36)

Indicators used to analyse results

Given the low number of respondents within the “Family Sightseer” and “General Sightseer” categories, these were excluded as indicators. All other categories are included as indicators by which to analyse the information behaviours of cultural tourists.

5.2 What are the changing information behaviours of cultural tourists?

These behaviours are analysed according to the type of medium engaged with when gathering or sharing information in connection to their trips

5.2.1 Internet/Web Usage

5.2.1.1 *What is the popularity of the Internet as a source of tourist information?*

General tourist behaviours

The literature confirms that Internet usage is an increasingly popular information gathering behaviour for tourists. For example a recent study identified that almost 85% of travellers from France, Germany or the UK used the Internet as one of its sources for destination selection and this is increasing year on year (PhoCusWright

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2011). Also 40% of EU citizens say that Internet websites are the **most important** source of information in their decision making process in connection to travel (EC 2012).

Another recent study sought to separate out the “destination selection” stage from the “trip planning” stage and identified the Internet was popular in both cases but it was more used in planning a trip (57%) than in deciding a destination (36%). The study also identified that the web was significantly less likely to be used whilst on the trip itself (11%), which could reflect the practical difficulties and cost of accessing websites when travelling (Bowker 2012:38).

Another recent study’s findings dispelled the common assumption that the internet is only used by younger ages by finding those over 55 are more likely to book their whole trip online than travellers under 45 years of age, with two-thirds taking to the internet compared to 57 per cent of the younger group (Travelsphere 2012)

Cultural tourist behaviours

In respect of cultural tourists, this User Survey found that of all the respondents who gathered information about their travel prior to their trip, practically all (99%) used the internet as one of their sources to gather information prior to departure.

No distinction was built in to ascertain what the comparative percentages were for destination selection as opposed to specific trip planning and this would be a useful topic for research in the future.

Also (and quite surprisingly given the potential practical and cost difficulties mentioned above) 68% of respondents stated that they tended to use the Internet when gathering information during the trip with 9% stating that it was their primary source of information during the trip. A strong factor behind the high usage during trips was the behaviour of those in the Generation Y age group, 73.9% of those who used it compared to 50% of over 55s. Whether the web was accessed via a mobile phone, tablet or desktop to gather information during the trip was not identified and could be the focus of further research.

These results contrast with the most up-to-date ATLAS survey of cultural tourists which showed that only 38% of respondents used the Internet as a source of information prior to departure and whilst in the destination this dropped down to 13% (Richards 2007). These low figures are most likely due to the survey being conducted in 2007 when web usage and wireless connectivity whilst travelling would have been significantly lower and indicate how much these behaviours have changed in such a short space of time.

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5.2.1.2 *How likely are tourists to use online search when gathering tourism information?*

General tourist behaviours

Visiting online search engines appears to dictate the online information gathering behaviours of large proportion of tourists, with two thirds of leisure travellers using them to access various travel related websites (Travelport 2011). Google also reported that a similar percentage of leisure travellers used search engines to begin their travel planning (Tnooz 2010).

Cultural tourist behaviours

From a cultural tourism perspective, the User Surveys concurred with these findings. For example:

- 56% of respondents were more likely to go to a search engine first (explorative behaviour) than tried and trusted websites (navigational behaviour) when gathering information in connection to their trips.
- As a breakdown:
 - 28% were fully explorative (“always type words into a search engine first and see where it takes me to”)
 - Only 6% were fully navigational (“always go to tried and trusted websites first”).
 - 29% were partially explorative and
 - 13% were partially navigational.

This propensity for using search identifies the need for the Proposed Service to focus on maximising strategies for search engine optimisation (SEO).

In terms of age or profile there were not many fundamental differences compared to the overall respondent group figures, except that interestingly the Serendipitous cultural tourists have a much higher propensity to use search, with 66% using search engines to identify information. Given that serendipitous cultural tourists could be deemed to have a more ‘explorative’ tendency in their overall tourism behaviours, could this be a case of an extension of such tendencies towards their information gathering behaviours?

5.2.1.3 *What types of sites are used when gathering information?*

General tourist behaviours

A large amount of literature explores the rankings for particular brands of top travel sites and the findings are unsurprising with the large commercial booking websites

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such as Expedia, Priceline (which includes Booking.com), TUI etc featuring highly for tourists in Europe (ETC 2012).

A significant proportion of the literature also focuses on the increasing importance of traveller review websites. For example:

- A much larger share of US and European respondents visited traveller review websites in 2011 when choosing their last leisure destination compared to the previous year (PhoCusWright 2011b)
- French, German and British tourists were at least one and half times more likely to use travel review sites in 2011 than in the previous year (PhoCus Wright 2011a).

This rise is of course most clearly seen in the increasing popularity of TripAdvisor.com which recently claimed to be the largest travel website in the world with 75 million reviews and 32 million registered users (ETC 2012)

The rise of traveller reviews websites and the strengths of certain brands is not particularly surprising. There is however not much literature that focuses on comparative studies of categories of other websites used by tourists for their information gathering. However one recent study surprisingly found that quite a large percentage of leisure travellers (40%) still researched “destination websites”, including public tourist body websites as a source of information (Travelport 2011)

Slightly surprising given the amount of choice and competition the internet has brought are findings that a smaller share of travellers from the UK, Germany and France visited three or more sites, compared to previous years indicating a lower spread of web usage in connection to travel (PhoCusWright 2012).

Cultural tourist behaviours

The User Surveys indicate that, if accommodation and travel price comparison/booking websites are ignored (as booking was deemed out of the scope of this research), individual cultural venue or events websites are the most popular category of websites when researching trips online before departure.

This is consistent with other research conducted by Culture24, which identified that whilst such websites were found to have very low attention share in the web overall, they were very popular with their dedicated cultural audience (Culture24 2011). This would therefore appear to extend to cultural tourists also.

When broken down according to age it can be seen that the primary reason behind these statistics is the high usage of these sites for travel planning by the over 55s, 75% of whom consulted them pre-trip.

Peer review websites are also very popular, used by the next largest majority of respondents (62%) and regarded as the primary website type by the most number of respondents. The most common example of such a website used (per the comments) is unsurprisingly TripAdvisor. The majority of peer review website users appear to be the Generation Y group, 76% of whom use them.

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Cultural venue and events listings websites were also used by the majority of respondents (57%) and were found to be very popular with Purposeful cultural tourists, 70% of whom used them. Serendipitous cultural tourists were less likely to use them (44%), which again might concur with their perceived serendipitous behaviour of turning up at venues and events rather than identifying them in advance.

Whilst 'other website' usage is quite high (46%) it is difficult from the comments here to spot any particular popular categories of website. although certain niche art form websites (e.g. film/dance festival/music/architecture websites), specific online forums, couchsurfing and lifestyle magazine websites did get mentioned a few times.

National or local tourist office websites are also quite popular (52%) and concur with the findings detailed above from the Travelport study in respect of destination websites. These were very popular with the over 55 group (75%) but not so much with the Generation Ys (36%).

Also notable is the relatively low usage of blogs (27%) overall, but which were very popular with Generation Ys (48%) and perhaps not as popular with Special Interest cultural tourists as may have been previously thought given the niche reputation of blog content. (32%) There was also almost non-existent use of Wikitravel, although some of the comments revealed that Wikipedia was a useful source of information on heritage sites.

Neither the breakdown for type of websites viewed during the trip, nor the number commonly visited overall, were explored. However given some of the findings detailed earlier, both of these could be subjects of further research.

5.2.2 Social Media Usage

5.2.2.1 *What are relevant general social media trends re tourists?*

(For the purposes of this study social media is deemed not to include Tripadvisor)

General tourist behaviours

The literature shows that amongst certain European tourists, non-participation in social networks is surprisingly high. For example over 40% of French and German tourists claim not to have actively participated in social networks in the last 12 months. Of those that have, approximately 50% were active on Facebook only with very few active on other major sites such as Twitter, Linked In and others.

Participation in Social Media tends to be higher for UK tourists (only 30% said they had no participation) and usage of Facebook, Twitter and Linked In were all substantially higher than the German and French tourists. Participation on any social network sites outside of these 'big three' social networks is very small with the exception of German tourists, 10% of whom were active on 'other sites'.

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Cultural tourist behaviours

With relation to cultural tourists, the User Surveys identified the following results:

- 90% of respondents currently use social media overall but 57% of over 55s surveyed do not.
- In terms of which social media is used, this is far and away dominated by Facebook (87.5%), Linked In (70%) and Twitter (50%), but a large proportion of over 55s did not use Facebook (66.7%) or Linked In (83.3%).
- There is very low usage of all other social media accounts such as Pinterest (12%).
- In the comments there were mentions of other social media accounts that were not picked up in the questions such as Formspring, Instagram and Soundcloud but within the respondent group were one-offs.

(Please note that the very large percentages in each case are likely to be caused by the small sample size being used for these sets of questions. However they provide useful comparative as well as indicative information)

5.2.2.2 How is social media used in gathering tourist information?

General tourist behaviours

Despite the overall popularity of social media, it currently appears to have very little impact on the specific information gathering behaviors of tourists. For example:

- Only 5% of EU tourists said that social media sites were important when it comes to making decisions about tourism plans (European Commission 2012:17)
- Within the UK less than 1% of tourists use social media when seeking inspiration for their holiday destination (ETC 2012)

Usage for tourist information gathering amongst active social media users in Europe is also very low, with approximately 40% of French, German and UK active social media users saying they have no interest in using social media for travel. (PhoCusWright 2011a).

Other UK based research found that while UK social media sites may be extremely popular, they are still some way from being considered the best source of holiday recommendations (YouGov 2011)

Cultural tourist behaviours

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In comparison to the literature for general tourist behaviours a surprisingly large percentage of respondents to this study's survey used social media as one of their sources of gathering travel information, with 44% using it pre trip and 46% using it during their trips.

Social media as a source of information was more popular with the Generation Y group and less popular with the over 55s, when compared to the overall respondent group.

The Serendipitous cultural tourist was also much more likely to use social media as a source of information than the overall respondent group.

5.2.2.3 *How is social media used in sharing tourist information?*

General tourist behaviours

Where social media does have a clear part to play in the tourist process, according to the general tourism literature, is in the sharing rather than gathering of information. Of the approx 60% of French, German, and UK active social media users who said that they were interested in using online social networks for travel, the large majority were interested in sharing updates/pictures/videos about travel experiences (PhoCusWright 2011a).

This emphasis on sharing is supported by the Bowker study which identified that the two leading uses of social media as part of the travel process were sharing photographs and keeping in touch (Bowker 2012:79).

Cultural tourist behaviours

The User Survey results demonstrate that cultural tourists are similarly interested in updating social media and uploading photos when sharing information about their travels, with blogging and posting reviews proving to be much less popular.

Overall they are more inclined to share information after a trip rather than during it. Unsurprisingly the over 55s were much less inclined to share information than the Generation Y group.

Aside from the social media usage described earlier, it was interesting to also note that the majority of the respondent group was less inclined to "publish" more generally, with 82.9% not owning or regularly updating blogs and not a single person being an active editor or updater of Wikipedia.

This could mean that Cultural Tourists are not generally natural 'publishers' of information, but sharing via social media in connection to their travels is an active behaviour.

5.2.3 Mobile Phone Usage

5.2.3.1 What are the relevant mobile phone usage trends re tourists?

General tourist behaviours

A recent study showed that 24% of European tourists claim to own a smartphone.

Unsurprisingly, usage by tourists of mobile phones to connect to the mobile web is increasing, with a 10% increase reported across key European tourism markets in 2012 compared to 2011.

Similarly, tourists are connecting more frequently as well, with about half in France and the UK now logging on at least daily (PhoCusWright 2012).

However this usage is currently impacted when on holiday overseas. Of the European tourists who own smart phones, a higher proportion use them less often when they go on holiday than the rest of the year (IPSOS 2011). This is likely to be caused by expensive roaming charges but the IPSOS study also points to a desire to “disconnect”.

Cultural tourist behaviours

From a cultural tourist perspective the User Surveys identified that a significantly higher proportion of respondents owned or regularly used smart phones than general tourists (85%). This relatively high result is likely to be caused by the small sample size for this question

However it may also indicate a greater propensity of smart phone usage in cultural tourists perhaps due to variations in income levels compared to regular tourists which is often claimed (Richards 2007). Further research with a larger sample size would be required to confirm this.

77.1% of these owners of smart phones used them to connect online whilst overseas but of these the majority would only connect through hotel or other such wireless networks, with the cost of roaming charges being attributed as by far and away the main reason for not connecting whilst ‘on the go’.

Several comments referred to data roaming charges being a big obstacle to engaging digitally with information whilst on overseas travels.

5.2.3.2 How are mobile phones being used in gathering and sharing travel information?

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General tourist behaviours

Interestingly mobile phone web activity specifically relating to travel is much smaller within these key European markets, with growth almost stagnant and in some cases, such as in Germany, actually shrinking. It is proposed that this may be a temporary blip due to the shift of smart phone owners from early adopters who are eager to engage in a broad range of mobile activity, to mainstream audience with less inclination to explore complex mobile functions. (PhoCusWright 2012)

The usage of apps (mobile phone applications) by travellers still appears to be low but for those that do use them, their relevance as an information source appears to be relatively high. For example apps were used by 15% of UK travellers to help plan their holidays and they account for 13% of all information resources used to plan the main holiday (Bowker 2012: 55).

In a survey of the most important travel app features, it is revealing to note that the most important is not content led but instead is the requirement that they are free. Reviews come next and then the ability to find nearby sights. In terms of app popularity for UK tourists, TripAdvisor's was the leading app for all stages of a trip, but was less dominant in terms of use during the trip itself (Bowker 2012).

Cultural tourist behaviours

The results from the User Surveys demonstrated that app use for information gathering was relatively high in comparison to the studies relating to general tourist behaviours, with 40% claiming to use them as one of their sources of information pre-trip and 53% using them during their trip.

Usage of smartphones specifically for other purposes (i.e. browsing the web, using social media etc) was not specifically measured. Whilst this could be the focus of further research it is clear from the current propensity of app usage, as well as social media usage for sharing, that tourist usage of mobile technologies is already proven to be a highly relevant information behaviour.

This is only likely to continue with the IDC forecasting that by 2015 smartphone sales will reach 982 million (IDC 2011) and that mobile use will surpass traditional desktop use possibly as soon as 2013 according to Gartner (Walsh 2010). Also the arrival of 4G as well as recent price caps put on data roaming charges within the EU may remove existing barriers to mobile connectivity for the tourist.

5.2.4 Word of Mouth

General tourist behaviours

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The literature confirms that in many cases the most popular behaviour when gathering information connected to travel is to seek out recommendations of friends, colleagues or relatives (before trip only).

A global benchmarking survey of 15,000 international tourists from 30 markets, found that four out of ten international visitors (38%) choose their destination based on friends & relatives' recommendation in 2011 (Travelsat 2011)

The primacy of this behaviour seems even more emphatic when looking at EU tourists. When asked to define the primary information source they used whilst making decisions about travel, a majority (52%) of respondents said that the recommendations of friends, colleagues or relatives were important to them when making travel decisions (European Commission 2012:17).

Cultural tourist behaviours

This is also a very common behaviour in relation to cultural tourists, with the most recent ATLAS Cultural Tourism Survey finding that discussions with family and friends was the source of information most frequently used prior to departure. When at the destination itself 'word of mouth' was still the second most popular source of information (Richards 2007).

This was also confirmed by this study's User Surveys which identified that 'word of mouth' was referred to as a pre-trip source of information by 86% of respondents and a during trip source of information by 79% of respondents.

5.2.5 Conventional Media Usage (Print/TV/Radio etc)

5.2.5.1 *How are conventional media sources being used in gathering and sharing travel information?*

General tourist behaviours

Whilst increased usage of the web has been perceived to spell doom and gloom for conventional media usage, it still appears to carry an important level of influence when gathering travel information.

25% of EU Tourists said that conventional media sources were a primary information source used by them when making decisions about travel plans (European Commission 2012:17). In a UK based survey, for Direct Line Holidays run by One Poll, respondents were asked to only select 1 major influencer when selecting their holiday and 13% still opted for traditional media (May 2012a)

The guidebook, while decreasing in overall usage, still appears to retain an important place in the information behaviours of tourists. In 2011, over a quarter of UK adults who travelled still bought guidebooks, either printed or digital. (Bowker 2012).

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Cultural tourist behaviours

Of relevance from a cultural tourism perspective, it is interesting to note that guidebook buyers are more likely to go on holidays that involve cultural pursuits. Also the sources of information sought most from guidebooks relate to history and culture and what to see and do, which arguably align themselves most to the cultural tourist (Bowker 2012).

This study's User Surveys also confirmed the popularity of guidebooks for cultural tourists with 71% of respondents using them as an information source pre-trip and 81% (most popular) using them during the trip.

"Other print material" also proved extremely prevalent as an information source for cultural tourists, being within the top 4 information sources both before and during the trip.

Our assumptions as regards age held true with the over 55 category much more likely to use printed guidebooks and other print material than the Generation Y group who are more focused on the digital sources of information.

These figures show that whilst non-digital forms of information gathering are in obvious competition with digital, they still occupy a necessary place for the time being. In particular it appears that the guidebook still remains relevant for cultural tourists in particular and further research could seek to confirm what aspects of information within guidebooks appeal to cultural tourists. However, given the differences of behaviour between age groups and the fast pace of change in digital behaviours, it is questionable whether this will continue to be the case in another 10 years. Only time will tell.

5.2.6 Tourist Information Requirements

General tourist requirements.

The literature indicates that overall tourists value information that is up-to-date and recommended to them. For example a survey of UK tourists cited the following requirements as the most important when it came to information gathering:

- up-to-date information
- the best things to see and do
- current prices and
- feedback from other travellers (Bowker 2012).

Studies also show that tourists require information that can be easily identified and navigable. For example a recent global tourist study identified that large percentages of respondents:

- admit to being irritated by being unable to find what they want.
- feel overwhelmed by the sheer amount of information out there and

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- feel frustrated by the difficulty of navigating that information (Travelport 2011)

Cultural tourist requirements

The User Surveys generally concurred with these findings. Respondents were asked if they had any suggestions as to how their information gathering and sharing in connection to their trips could be better supported.

There were a number of comments that referred to the current abundance of cultural venue/event information online but referred to much of this information being too dispersed over numerous sites, not niche or local enough, not easy to locate per country/region and often not up-to-date.

In response to this many suggestions indicated the desire for a clear source of up-to-date and local/niche cultural venue and events information across Europe or per country that could be tailored to meet an individual's requirements. Some examples of comments include:

"Maybe there needs to be a dedicated website that just covers cultural events/exhibitions/venues for cities around the world. Maybe this already exists and I'm yet to discover it. But I think when researching a trip, it would be good to be directed to a special cultural website. Maybe this site can be a link on sites like Expedia and Trip Advisor. It could also be a website that you know to go directly to. I feel sites like Time Out are over cluttered with info about everything...bars, restaurants, hotels etc. It would be good to be able to go to a decent cultural event site that has specialist information about popular cultural events/venues, but also obscure ones as well. Does a site like this exist?"

"an application that automatically suggests events, venues, accommodations and locations that I am interested in"

"listings that are relevant to you re what exhibitions and what performances are on. Local knowledge is key."

"there is plenty of information out there but if there was a website that made it all concise, I would use it"

"haven't found a useful source for art exhibitions across Europe and I would find it useful if there was such a site"

"would be good to have greater access to cultural events listings in any given place"

"Would be good if there was a family friendly website - which aggregates all family events and venues together. Would be good to have some kind of app that provides info about all accessible friendly events near you - just in time"

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Another common theme arising from the questions was a desire to not 'over-plan' and gather too much information pre-trip and just discover things on arrival or just be inspired. Examples of comments include:

"I like finding stuff out and not overplanning"

"I do not like to plan too much (just a first accommodation when I arrive). Prefer not to plan too much and like to explore and discover while I'm travelling".

"Don't feel the need to consult lots of sources of info - often just want to turn up and see what happens"

Despite these comments, when respondents were asked which stage in their trip (pre/during/post) they were most active when it came to information-seeking (with ability to choose more than one), a much larger proportion said pre trip (72%) rather than during (39%) and post (19%).

However when split by age the over 55s were much more focused on the pre-trip phase while the Generation Ys were more equal across phases . This could be related to the increased digital (mobile) usage of this group and indicated a possible 'levelling out' across information stages as digital usage increases and younger tourists develop.

It is also interesting to note that the information behaviours of the Serendipitous Tourist motivation profile was also much more even across all stages, possibly inferring the lack of upfront planning and thus the presence of a similar serendipity in the nature of their information gathering and sharing behaviours.

5.2.7 Awareness and usage of digitised collections information

The User Survey also briefly explored respondent awareness and usage of digitised collections information.

The survey identified that whilst there was relatively high awareness of digitised collections information (70%), only a minority of these had accessed or viewed these, demonstrating relatively low usage by cultural tourists.

5.3 Conclusions

Key conclusions to be drawn from this analysis can be summarised as follows:

- When publishing information for tourists it is important to identify and engage their digital information-seeking behaviours
- These information behaviours are changing rapidly and as such this analysis can only represent a snapshot in time.
- Use of mobile technologies, by tourists will increase as connectivity improves and roaming charges reduce.
- As mobile technology usage when travelling increases, cultural tourists are more likely to source information during their trips as well as before them.
- Sharing of information via social networks is also likely to increase, both during and after the trip.
- There is a strong desire from cultural tourists for cultural venue and events listings information that is up to date, local, niche, tailored to their requirements easily discoverable and navigable.
- Whilst there is some awareness currently of digitised collections information from cultural tourists, there is little usage of or engagement with it.
- Serendipitous behaviour plays a part in information gathering before and during trips.
- Peer reviews websites, Public Tourist Body websites and individual cultural venue websites are popular amongst cultural tourists when gathering information and as such represent potential partners for the Proposed Service.
- Non-digital forms of information such as printed guidebooks are still very popular particularly amongst cultural tourists and have not yet been fully replaced by other digital forms of information. Whether this will happen in the next 5 to 10 years is unclear.
- Cultural tourists are increasingly focused on using online search as a way of accessing information and as such SEO strategies are a key consideration for the Proposed Service.

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Recommendations for further research in this area are:

- Detailed investigation as to how cultural tourists are specifically using mobile technologies to gather and share information to better understand the impact of this.
- Detailed investigation as to how cultural tourists use information for inspiration in choosing destinations and activities, rather than for specific planning
- Detailed user testing exploring specific ways in which digital collections and listings content may be used by cultural tourists.

6 The Existing Supply Analysis

6.1 Introduction

6.1.1 The information supply and the strategic supply

The existing supply analysis seeks to explore the current strategic and information supply to cultural tourists.

The information supply focuses on trends and issues impacting on existing publishers of content to cultural tourists, in order to identify what the Proposed Service can learn from these. Publishers in this case are Commercial Tourist Publishers and Public Tourist Body (PTB) Publishers. The key questions that this analysis seeks to explore regarding these are:

- What are the current market trends impacting on tourism publishing?
- How are existing publishers addressing these trends?

The strategic supply focuses also on PTBs, but in this case specifically in their unique role as strategic drivers of cultural tourism for destinations. The analysis in this area seeks to identify what strategic opportunities and challenges the Proposed Service will face when seeking to collaborate with PTBs in this capacity. The primary question it seeks to explore in order to identify these opportunities and challenges is:

- How do PTBs currently articulate their cultural tourism strategies?

This analysis relies partly on literature review and partly on case studies. The literature primarily seeks to explore the publishing trends. The case studies explore how these trends have been responded to practically as well as how cultural tourism strategies are being articulated practically.

6.1.2 The case studies

The case studies chosen to represent the commercial tourism publishers are TripAdvisor, Lonely Planet and Rough Guides. The reason for this choice is that the former represents the 'new' type of digital tourism publisher, whereas the latter two represent the 'traditional' guidebook publishers. Both Lonely Planet and Rough Guides were chosen in the 'traditional' category as it is useful to compare and contrast how each have managed the shift to digital.

Also all three publishers appear relevant for cultural tourists on whatever platform is used. In a recent survey all three publishers lead the way in specific information usage relating to history/culture and what to see and do information. Also both Rough Guides and Lonely Planet users are more likely to take cultural holidays than other guidebook users (Bowker 2012). TripAdvisor could not be ignored as it is now the most popular travel site in the world. All three publishers therefore present relevant examples for the Proposed Service.

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From a PTB perspective, the case studies have been selected based on Culture24 and Plurio.net's geographical links and networks. These therefore focus upon the UK and the Greater Region. Where possible PTBs have been chosen at a national, regional and local level. The case studies are:

- UK
 - Visit Britain
 - Visit England
 - Visit Brighton

- Greater Region
 - Touristic Marketing in the Greater Region Project
 - This represents a cross border public tourism strategy for the whole Greater Region
 - Referred to as the "Greater Region PTB" for the purposes of this study

 - Direction de la Stratégie Touristique of Wallonia
 - Referred to as the "Wallonia PTB" for the purposes of this study

 - Direction of Cultural Affaires and Direction of Tourism of Lorraine
 - Referred to as the "Lorraine PTB" for the purposes of this study

As regards the discussion of PTBs as publishers, the UK case studies are primarily relied upon due to ease of review of their publishing tools. For the discussion of PTBs as strategic drivers of cultural tourism, all the case studies are referenced to.

6.2 The Information Supply

6.2.1 Travel Publishing Trends

6.2.1.1 *The shift to digital*

There has been much debate about the impact of digital on publishing, but it is fair to say that with common user behaviours of reading, listening, gaming and watching all regularly taking place on digital platforms, the rather tired binary of print v digital has now run its course for publishing. "Digital with its power to fuel destabilisation and innovation in equal measure, might once have been a label for the new and unknown, but today it is an accepted underlying force within the sector" (McIlheney 2012). This essentially means that for the publishing sector it is no longer a case of whether digital can and should be embraced, but instead that digital has become a fundamental fact of life. As such, any publisher that cannot demonstrate a full integration of digital within its core strategy will struggle

6.2.1.2 *The advent of SoLoMo*

In travel marketing and publishing terms, several commentators are referring to 2012 as the year when SoLoMo (Social, local and mobile) took off. This essentially

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takes the form of mobile phone apps that combine social networking and location data, the most well-known example probably being Foursquare. This has come about with the proliferation of Internet and GPS-enabled mobile devices as well as our growing combined need to always be connected, share our travel experiences and gather information from our local environment. In 2012, many travel publishers sought to respond to these needs with a flood of social travel and destination guide apps being released this year.

6.2.1.3 *Content is king again*

There is strong recognition within the publishing market that content, as in engaging, 'sticky', rich and shareable content, is fast supporting the publisher's brand as a way of reaching out to customers. Even retail centric brands (e.g. Asos) have started becoming publishers of editorial content, "recognising that the way to take centre ground in the lives of their customers is through great content, i.e. 'owned media' and not advertising" (Bonn 2012) Also the end of the print vs digital debate has signalled a consensus that "the focus should be on the content and not the platform" thereby signalling "an ideological return to the fundamental premise behind the business of publishing in the first place" (McIlheney 2012).

Further, recent Google search algorithmic changes now favour more content rich publishers (particularly those containing relevant niche information), so-called 'white hat SEO' over those who attempt to exploit paid links and fool the algorithms, 'black hat SEO'. Therefore increasing relevant content online has become a valuable way of improving SEO.

Within the travel publishing market, this emphasis on content publishing has been most recently seen in Google's plans to buy the Frommer's brand of travel guides. This presents the latest evidence of Google seeking to transform itself into a publishing company that not only searches for the most relevant information but seeks to produce that information as well (Miller 2012)

6.2.1.4 *The increase of user generated content (UGC)*

User generated content (discussion forums, uploaded photos, comments to an article and so on) has continued to grow in value and impact on publishers. This has been seen most relevantly in the tourism sector in the form of user reviews of hotels, restaurants and other facilities as well as the proliferation of travel blogs. This form of content not only presents an opportunity for users to self-publish or engage in conversation, but also satisfies a growing need for information that is either recommended, locally sourced or fulfilling niche interests. It also potentially destabilises the authoritative 'voice' that many publishers rely upon.

The user review has of course gained particular popularity via TripAdvisor, this will be discussed in more detail in connection to its case study analysis.

The high online profile of travel blogs responds to the growing interest in the local when travelling as well as the rising favour of niche content with audiences and within search algorithms. In some cases this has meant that certain blog writers have

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been recruited by large publishing companies to generate local niche content in their name, but in many cases this has also led to individual travel blogs gaining a more mainstream presence both in search results and within other publishing sites. For example The Guardian recently announced, “a partnership with bloggers in cities around the world to help expand and diversify our content and bring a local perspective on the places you want to visit”. This partnership involves Guardian Travel publishing pieces from its network of bloggers, who are chosen for their particularly local perspective, and providing links back to the original blog (Guardian.co.uk 2012).

Other similar forms of user generated content in travel publishing relate to online travel magazines that source publication content from users (e.g. Everywhere Magazine) or alternatively host ‘my travel’ sections where users can start their own travel journals, add photos and videos (e.g. see budgettravel.com)

6.2.1.5 Engaging with the user’s complete information journey

The likelihood of increased usage of mobile phones whilst travelling overseas (as connectivity improves and roaming charges fall), alongside the advent of SoLoMo, means that increasingly travel publishers may seek to provide information to the traveller not only prior to departure but also during and after their trip. The traveller’s complete “arc” (planning to post-trip and memories) is becoming viewed by publishers as an opportunity to develop a cycle of continued provision of information and engagement.(Head 2012)

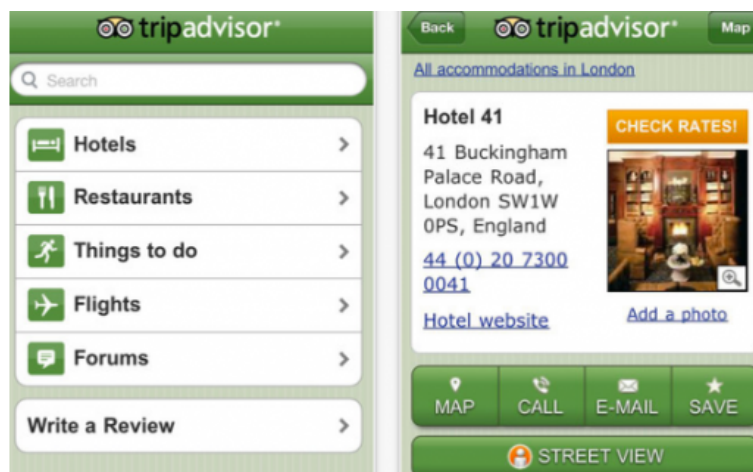
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6.2.2 “New” Commercial Publishers Case Study: TripAdvisor

6.2.2.1 *The shift to digital and SoLoMo*

The rise of TripAdvisor is of course emblematic of the shift to digital travel publishing. In the last couple of years it has really embraced SoLoMo. From a social perspective TripAdvisor’s biggest development was in 2012, when it launched its first personalised recommendation system for hotels, attraction and restaurants by allowing users to log in with their Facebook accounts and then view their friends’ reviews of places. It is estimated that one in four reviews submitted each day on TripAdvisor are written by a Facebook connected user (Dailymail.co.uk 2012)

TripAdvisor has been quick to respond to the demands of mobile-friendly publishing ever since 2010 when it launched its mobile website and its first iPhone application.



As of December 31 2011, TripAdvisor reached 13 million total downloads of mobile apps, and 16 million unique visitors per month via mobile devices. Its primary app is the world’s second-most-popular travel app, behind Google Earth (ETC 2012)

This year TripAdvisor has really embraced SoLoMo by establishing data sharing partnerships with other publishers in the development of apps, e.g. a partnership with TheTrainLine to enable users to tie in their search for rail bookings with a facility to find products at the destination featured on the TripAdvisor system (Fletcher 2012) Another example is the Local Picks app, released with Facebook, which pulls in reviews of 850,000 restaurants from TripAdvisor, re-sorts them to more heavily weight the opinions of actual locals, and auto-shares an individual’s reviews to their Facebook Timeline (Tripadvisor.co.uk 2012a).

6.2.2.2 *Content*

UGC

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TripAdvisor is all about content, most notably of course its user-generated reviews and so the trend toward more content fits comfortably. In mid 2012 it reported reaching 75 million reviews, a 50% increase on 2011 (Tripadvisor.co.uk 2012b).

Despite the growing reliance on user-generated reviews, their impact has been less positive in recent times due to numerous complaints of 'fake' or untrustworthy reviews. TripAdvisor was banned earlier this year by the UK's advertising regulator from claiming that its users' hotel write-ups are "reviews you can trust" from "real travellers", after complaints that the site did not verify its ratings (Bradshaw 2012). This also points to a potential change in users' behaviours as they become more discerning about the types of reviews they take notice of. A key strategic driver for TripAdvisor going forward is to seek out ways to address this change. The link with Facebook is a big step in that direction.

TripAdvisor also encourages other types of UGC such as a venue photo upload function, discussion forums and user generated "Traveller Articles" similar to Wikipedia or Wikitravel.

Editorial content

TripAdvisor contains very little 'editorial' content aside from engaging freelance writers with their 'Travel Guides' section. However this appears to be more a curation of reviews rather than any written content.

Cultural Venue content

TripAdvisor contains information and UGC content about various cultural venues such as museums, galleries, heritage and sites.. These are contained within the 'Attractions' section of the 'Things to Do' in any particular location. Despite not being as obvious a TripAdvisor content type as hotels or restaurants, the 'Attractions' section still remains popular with TripAdvisor users as it is estimated that of its 70 million unique visitors, approximately 12% explore the 'Attractions' section (Copus 2012)

This cultural venue content includes:

- a description of the venue
- various basic details about the venue (address, website link etc),
- user generated reviews of the venue
- user generated photos of the venue (no videos however)
- venue generated content such as responses to reviews, ability to upload photos and also videos

This venue information may also feature within certain editorialised content in the form of 'Travel Guides' written by freelance writers as well as the traveller articles referred to above.

Cultural Events content (and collections content)

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There are currently no events listings related to these venues but an interest was shown in them when discussed as part of this study. When the possibility of surfacing digitised collections content was explored, the initial response was that this “might only be for the purists” who were not regarded as a TripAdvisor typical user. However interest was shown in the possibility of surfacing a package of data that connected up certain collections information with events listings and related editorial content (Copus 2012)

6.2.2.3 *Whole Journey Engagement*

A recent study demonstrated that the TripAdvisor website and apps are used heavily by far more tourists in connection with their pre journey planning activities compared to other travel sites and apps, but surprisingly were used slightly less used than other travel sites and apps whilst on the trip itself (Bowker 2012). No statistics were available for the post journey engagement, but it is clear that that the opportunity to post reviews of visits would also engage users post trip.

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6.2.3 “Traditional” Publishers Case Studies: Lonely Planet and Rough Guides

6.2.3.1 Shift to Digital and SO/LO/MO

What does this shift to digital mean for traditional guidebook publishers such as Lonely Planet and Rough Guides? Printed travel guides sales have fallen by around 40% in the UK and US since their 2005 peak (Mesquita 2012). However we have also seen the apparent popularity of printed guidebooks with cultural tourists holding firm so there is still clearly a market (albeit shrinking) for these. The general view appears to be that “publishers who retain a legacy ‘print v digital’ mindset and don’t adopt a more platform-neutral approach and sell format agnostically will struggle” (Head 2012) and those who survive will be those who “convert themselves from book publishers to providers of digital content who also publish books” (Mesquita 2012)

Lonely Planet appears to have embraced this shift wholeheartedly, particularly since its takeover by BBC Worldwide, which announced its decision to push for a massive digital presence. Lonely Planet EMEA CEO Stephen Palmer stated at the time “We have the best guidebook series in the world, and clearly we want to be in the same position online”, (Rushton 2007). Its website has won several ‘best travel site’ awards (Gallagher 2009) and feedback about usability and content has been generally excellent. The website also has a well-established travellers forum, Thorn Tree, with a new post apparently every 12 seconds.

The screenshot displays the Lonely Planet website homepage. At the top, there is a navigation bar with the Lonely Planet logo, a search bar, and a promotional banner for a 20% discount on guidebooks. Below the navigation bar, there are several sections: a featured article titled "24 hours in Montréal" with a carousel of images, a "WHERE DO YOU WANT TO TRAVEL?" interactive map, a "BEST IN TRAVEL 2013" section listing top 10 cities, a "TRAVEL NEWS" section with updates for travellers, an advertisement for Audible.co.uk offering a free audiobook, an "IN OUR SHOP" section with a "3 for 2" promotion, and a "FEATURED PRODUCT (PROMOTION)" section.

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Lonely Planet also has over 150 apps on a variety of publishing platforms which incorporate a huge variety of city guides (for 70 cities), audio walking tours and audio phrase books.

Rough Guides, which was a strong competitor to Lonely Planet in terms of books sales, has in comparison struggled to make the digital shift. Its website has been unfavourably compared to Lonely Planet's and various promises to revamp it sometime soon have not appeared to have taken place (Teller 2012). It has had multiple stalled redesigns and botched content management systems.

Rough Guides' biggest digital challenge has been its relationships with the authors, many of whom retain ownership of their work and receive royalties for use. Unlike Lonely Planet, which began buying back rights from authors in the mid-1990s, Rough Guide kept a royalty system in place until late in the 2000s, by which time Penguin (who bought Rough Guides in 2002) had missed its opportunity to build an online presence and book sales had declined to a point where they couldn't afford to buy out authors (Clampet 2011). It has therefore sought to keep a larger focus on its print publishing (all its books were recently redesigned) compared to its digital publishing. This is evidenced also in regards to its mobile publishing output which has struggled, where in comparison to Lonely Planet's over 150 apps, Rough Guides has around 15 with only 8 city guides (compared with Lonely Planet's 70). However, news as we complete this report of Penguin joining forces with Random House suggests digital may be pushed higher up Penguin's agenda as they make use of Random House's strong digital infrastructure and offer.

Lonely Planet has also begun to embrace SoLoMo through its involvement in Wenzani, a mobile travel guide that, like the TripAdvisor/Facebook link-up sources recommendation from friends, but uniquely also features expert recommendations from Lonely Planet (as well as Time Out and Frommers). There is no evidence yet of Rough Guides considering something similar.

6.2.3.2 Content/UGC

Editorial content

The distinctive slice of content that Lonely Planet and Rough Guides have compared to the likes of TripAdvisor is their editorial content written by writers with specialist knowledge and insight of places. This forms the majority of Rough Guides and Lonely Planet's online content offer but is limited compared to what is contained in the print guidebooks in an effort to preserve their paid income model.

The fundamental question for these publishers is that given the rise of user generated content in the form of reviews and blogs does their form of 'expert' editorial content still have a future online? Certainly the notion of the consumer as producer does present a perceived dilution of the notion of 'expertise'. However the changing behaviours of users towards seeking more authoritative UGC, would appear to present an opportunity to these traditional publishers to reaffirm their

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'expert' position. Certainly Lonely Planet's involvement in Wenzani would appear to be taking advantage of such an opportunity.

Many travel blogs with their emphasis on the niche and local also project an 'expertise' and in some cases are able to compete with traditional publishers. For example "Spotted by Locals" which is a series of locals' blogs about places, now publishes more Europe city guides than Lonely Planet, Rough Guides, Frommers and Time Out (SpottedbyLocals.co.uk 2012)

Whilst the future role of editorial content is open to debate, it becomes even more essential for Lonely Planet and Rough Guides to not only look for opportunities to maximise the value they can obtain from this editorial content, but also to consider other forms of content such as UGC to complement it.

UGC

Lonely Planet appears to have done this by enabling user reviews of all venues as well as its popular Thorn Tree discussion forum. It is also currently 'reviewing the review process' to explore how to surface reviews that are most relevant to and can be trusted by the traveller with curation, connection to social networks or combining with expert views all being proposed as possible options. (Eyefortravel.com 2012).

Rough Guides' only foray into UGC is through its recently released TripLens app that allows users to create photoblogs. However with travellers already posting updates on blogs, social networks and photo-sharing communities like Flickr it is unclear yet how much this will be embraced.

Cultural venue and events listings

Both publishers' online platforms contain cultural venue listings with broadly comparable information (editorialised description, no photos) with the exception that Lonely Planet also has user reviews connected to them.

Neither publisher has cultural events listings.

6.2.4 Public Tourist Body (PTB) Publishers

6.2.4.1 Shift to Digital and SoLoMo

The Public Tourist Body has long held an information provider role, usually in the form of Tourist Information Centres, handing out maps, brochures, guides and various other printed materials. The shift to digital was initially made in a straightforward way with the development of officially branded brochure-style PTB websites staying consistent to the themes of information provision.

In a requirements gathering exercise for a new internationally focused website, Visit England identified that PTB websites were viewed primarily as information providers, and were highly trusted in this role, rather than websites for making bookings which was less a requirement and more an optional extra. (Visit England 2009) A study of 120 UK PTB websites undertaken in October 2010, identified that the primary purposes behind the provision of information by such websites could be grouped into 4 areas:

- **“enjoy doing something”**
 - provide information on tourist attractions/activities

- **“there is a place”**
 - provide information about the geography, history and local culture of a destination

- **“in a given period of time”**
 - provide information about events and seasonal tourism

- **“where you can go and stay”**
 - provide information about itineraries, transportation and accommodation (Inversini et al 2011)

A recent study found that PTB websites still remain popular with 40% of leisure travellers saying that they used this category of site to research their last trip, and it appears that their image as reliable information providers plays a part. The study points out that the fundamental philosophy behind such sites is to seek to guide and provide direction, as opposed to commercial sites that need to capture and retain customers, and as such better meet the needs of tourists who are “looking for a mix of inspiration about what they may do alongside practical information” (Travelport 2011: 9).

Whilst all the PTBs focused on by this study had websites that conformed to the information provision functions described above, no pieces of research could be identified that explored the usability, usefulness or popularity of these particular sites so conclusions cannot be drawn on user responses to these. However the

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findings of the Travelport study indicate that PTB websites do currently satisfy an information need in tourists.

However with the expanding role of social media and mobile in travel, the increasing popularity of personal recommendation as an information source and the sheer size and market share of TripAdvisor, will PTB sites remain as relevant to the needs of tourists? In responding to the other aspects of the shift to digital, namely the embracing of other publishing platforms or engaging with SoLoMo, PTB sites appear to be lagging behind.

A recent study of the online presence of 30 PTBs across the world found that they only use a fraction of the available technology tools for promoting destinations online and the vast majority of destinations do not exploit all technological capabilities. (May 2012b). Of the case studies explored by this study only those in the UK (Visit Britain, Visit England and Visit Brighton) had developed an app and none had as yet sought to develop apps or activities with partners based on the SoLoMo concept.

6.2.4.2 Content

Editorial content

Editorial content (primarily text and images) is a key source of information on PTB websites and aims to reflect the expert 'voice' that many PTBs seek to project to their audiences. This emphasis on expert editorial is similar to what has already been seen with the 'traditional' commercial publishers and many of the issues discussed in context to those also apply here.

This editorial content usually aligns itself with impactful design and appearance, incorporating lots of stylised images, colour and visual prompts such as Top 10s.

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The screenshot shows the VisitEngland website interface. At the top, there is a navigation bar with categories like 'SPECIAL OFFERS', 'HOLIDAY IDEAS', 'ENGLAND 2012', 'PLACES TO VISIT', 'WHERE TO STAY', 'THINGS TO DO', 'COMPETITIONS', and 'PRACTICAL INFORMATION'. A search bar is also present. Below the navigation, the main content area is titled 'THINGS TO DO' and features a section for 'Castles and stately homes'. This section includes a large image of a castle by a lake, a decorative initial 'E', and several paragraphs of text describing various castles and stately homes across England. A sidebar on the right lists '10 TO VISIT' with a list of castles and their locations. At the bottom of the sidebar, there is a 'WE LOVE' section featuring a heart icon and a small image of Blenheim Palace.

VisitEngland

Home > Things to do

THINGS TO DO

Castles and stately homes

Explore Tudor seats and rambling palatial mansions

England takes some beating when it comes to castles and stately homes, with hundreds to explore across the country.

For sheer size and spectacular gardens, **Chatsworth House** in Derbyshire is hard to beat. The elegant, treasure-stuffed rooms here make it one of the most gorgeous 'statelys' in England (at least in our opinion), or how about a wander round the poignant ruins of **Witley Court** a rather gorgeous 19th-century mansion in Worcestershire?

In **West Sussex** you'll find the inspiration behind Mervyn Peake's *Gormenghast* trilogy in **Arundel Castle**, a towering stately home and fortified castle built in 1067. Across the county in the east sits the delightful **Bodiam Castle**, a 14th century late medieval moated fortress with courtyard and battlements to explore, and interpreters on hand to fill in the history.

If you like your stately homes with a bit of wildlife, however, then head to **Longleat House and Safari Park** in Wiltshire for the day. If you see an exotic-looking creature with a brightly coloured coat wandering around, though, that's probably the impressively eccentric Marquess of Bath – who has been seen roaming the grounds in his patterned robes.

Maybe you're more of a fan of knights, ladies with flowing hats and a spot of good old jousting, however? In that case we've a feeling you'll love **Compton Castle** in **Devon**. This medieval fortress is bristling with towers, turrets, a moat and portcullis, and oozes romance and history.

Picture of four officers, here about 1610, in the forecourt of one of the finest of palaces in Surrey, when

10 TO VISIT

- > Warwick Castle, Warwickshire
- > Arundel Castle, West Sussex
- > Compton Castle
- > Hampton Court Palace, Surrey
- > Chatsworth, Derbyshire
- > Longleat, Wiltshire
- > Castle Howard, Yorkshire
- > Carisbrooke Castle, Isle of Wight
- > Alnwick Castle, Northumberland
- > Corfe Castle, Dorset

WE LOVE

BLENHIM PALACE
Birthplace of Sir Winston

Image related content

As discussed above, stylised images used as part of editorialised content are very prominent in many PTB sites, largely as a way of promoting brand. Indeed Visit Brighton noted that the somewhat unrealistic prevalence of blue sky and sun across all their images on their main website related to the promotion of the perceived Brighton brand (Carmichael 2012). Research by Visit England referred to “picture power” and concluded that “the influence of a picture cannot be understated...one that enables a viewer to put themselves into the mood, feeling and emotional charge of the place” (VisitEngland 2012c)

But the use of such pictures currently appears to be mainly used when embodied within editorial rather than as a separate focus. The UK PTB site study found that only 36.7% of sites used picture galleries (Inversini et al 2011).

User Generated Content

Whilst some PTB sites (e.g. VisitLondon) have opted to integrate UGC such as TripAdvisor reviews and ratings within member listings on their official sites, UGC content does not usually appear on PTB sites. This is despite several attempts to integrate it and an acknowledgement of its appeal to the user.

A survey conducted by VisitScotland in October 2009 found that travellers were highly in favour of seeing TripAdvisor reviews on its website (VisitScotland2009) and

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despite these being surfaced for a time they have since been removed and it is unclear why this is so.

More recently (March 2011) both Visit Britain and Visit England announced partnerships with TripAdvisor that enabled users of their websites to see the top 10 attractions and restaurants for popular cities and holiday destinations, as decided by millions of TripAdvisor travellers. However this functionality appears again to have been removed with Visit England indicating that certain technical issues such as a delay in updating the rankings were responsible (Field and Lewis-Jones 2012).

It appears that whilst recognising the power of UGC, many PTB websites have still not been able to embrace it. Perhaps it is viewed as compromising the authoritative voice that the PTB seeks to convey. In fact when gathering requirements in connection to its international site, Visit England identified that user generated content had to be carefully managed to avoid damaging trust (VisitEngland 2009). It is interesting to note that both Visit England and Visit Britain have since gone for a more editorial driven approach in their top 10s with these being internally 'curated', as well as only including reviews that are editorially sourced.

Cultural Venue and Event Listings Content

A large proportion of PTB websites contain listings of venue and events. The UK PTB study found that 93.3% feature Cultural Events and List of Events Venues. The likely reason for the high percentage in the UK is that most local PTBs have partnership arrangements with their local venues to promote them in this way.

Print related content

Despite the shift to more online or digital forms of publishing many PTBs still focus their content production on printed output, which may often be downloaded online. A large amount of the content produced by the Greater Region PTB for example is in the form of extensive glossy brochures or guides, which are also available as PDF downloads. Visit England in their requirements gathering for their international website noted "the importance of retaining content typically associated with tourist boards – such as brochures or factsheets to read or print" (VisitEngland 2009). The study of 120 UK PTB sites found that the large majority (approx 70%) still had access to print downloads (Inversini et al 2011)

Other Multi Media Content (Video/Audio)

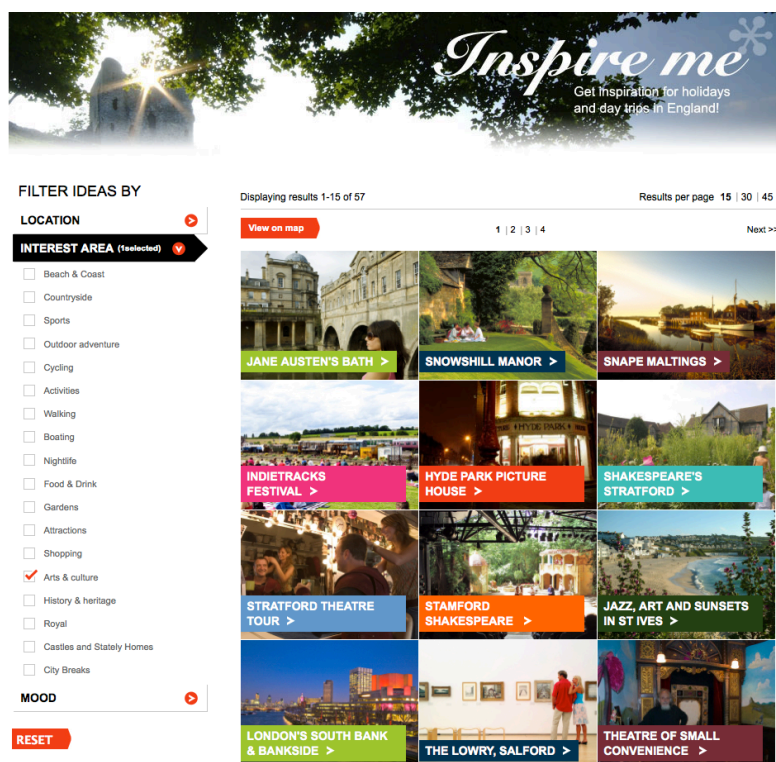
Generally the presence of multimedia content is low on PTB sites. The UK PTB study found that videos were used online by 28.3% of DMO websites, podcasts were present in 15% and Virtual tours appeared in 4.2% of cases (Inversini et al 2011). The requirements gathering for the Visit England site found that "more advanced web 2.0 content like videos, podcasts was seen as low priority" (VisitEngland 2009).

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6.2.4.3 Whole Journey Engagement.

Given their emphasis on information provision and their primary focus on websites rather than other digital tools, PTBs are largely set up to engage the tourist before their visit. The recent study of 30 PTBs across the world identified that the majority concentrate only in providing information for "before travelling phase" and that few destinations use any technology for the "during the travel" period at the destination, or after the trip (May 2012b).

However there is some evidence from the case studies that PTBs are aware of this and are increasingly seeking to engage the user across all the stages. For example recent research commissioned by Visit England identified the need to focus not only on engaging users during their planning phase, but also acknowledging that prior to that was an "inspiration" phase, and that during and post trip was a significant period of sharing information that should also be engaged with. (VisitEngland 2012d) The inspiration phases has been promoted actively by Visit England especially in its website design that has an 'Inspire me' section.



However, beyond recognising that user sharing is an important information behaviour during and post trip, there is no evidence as yet of how Visit England is seeking to serve these other phases.

Visit Brighton indicated that their approach in linking up with the user focused on four key stages, namely: inspire, inform, enable and engage. Again we see the relevance of the inspire stage here. It was also indicated that there was a greater emphasis on the 'engage' stage in their approach, which covered the ongoing period of user behaviour post information gathering. The importance of driving a two-way

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conversation with users was highlighted as a priority for this, by using social media rather than more formal channels. It was more important to prompt some sort of opinion from someone via these channels even if not a positive one. As such there was recognition of the growing importance of these more two-way forms of user engagement, over the more one-way and hackneyed approach of supplying information only (Carmichael 2012)

6.2.5 Conclusions

This analysis identifies a range of opportunities and challenges for the Proposed Service. These can be summarised as follows:

- The perceived ‘completed’ shift to digital within publishing and the emphasis on content are positive trends for the digital content-led approach that the Proposed Service is seeking to adopt.
- The advent of SOLOMO demonstrates how quickly change is taking place in publishing platforms, the challenge is to keep up with these developments.
- The prevalence of UGC represents a challenge to the more ‘expert’ content that the Proposed Service seeks to deliver. However, changing user behaviours appear to increasingly seek out ‘expert’ content as a way to navigate ‘untrusted’ user generated content so there may be opportunity here.
- The Proposed Service should seek to engage the user’s complete “arc” including exploring how collections content may inspire cultural tourists as well as support planning and sparking conversations.
- Commercial publishers such as TripAdvisor, Rough Guides and Lonely Planet do not currently provide cultural event listings. This provides an opportunity for the Proposed Service.
- TripAdvisor currently has very little editorial content and may increasingly seek such content as a way to address the trust issues that its UGC model currently faces. The Proposed Service may consider addressing this need by supplementing existing content with an editorial layer, emphasising the ‘authoritative’ nature of its content.

6.3 The Strategic Supply

In an analysis of the strategic approaches to cultural tourism by each of the case studies, the following inferences can be drawn:

6.3.1 A variety of approaches

The respective strategic approaches to cultural tourism were generally quite broad across all the PTBs, probably reflecting their respective strategic priorities as well as their own organisational opportunities and challenges. These can however be very loosely grouped within the following 3 categories:

- **No specific, separate cultural tourism strategy**

This was identified from the Wallonia PTB where it was pointed out that “until now cultural tourism just happens but there has never been a proper strategy for this” The primary reason behind this is that Culture, Tourism and Heritage in Wallonia are separate responsibilities so it is very hard to promote a cultural tourism strategy that would sit across all three departments. (Duhaut 2012)

- **No specific cultural tourism strategy as inherent in overall strategy**

Such an approach was identified from Visit England, Visit Brighton and the Lorraine PTB. At Visit England it was pointed out that there is currently no cultural tourism strategy as the focus is not on niche cultural tourism interests, but instead on “how to build a cultural offering into the wider strategic offering” which is currently focused on ‘growing tourism locally’ (Field and Lewis-Jones 2012).

The Lorraine PTB expressed surprise at being asked about cultural tourism strategies as culture (primarily in the form of cultural heritage) is regarded as an inherent component within the Lorraine tourism offering (Boendermaker 2012)

At Visit Brighton the interpretation of what comprised culture was much broader, with a view that engaging with local pubs, visiting Brighton pier and other landmarks were also relevant forms of culture. As such it is perceived that any visitor to Brighton would be a cultural tourist in some way and a key strategic objective was to provide a broad cultural spectrum to visitors (Carmichael 2012)

- **A specific cultural tourism strategy driven by brand**

This approach is seen at Visit Britain and the Greater Region PTB and perhaps is a product of their respective ‘outward facing’ perspectives. Visit Britain has developed a ‘strategic topic profile’ based on culture and heritage. This focuses on an acknowledgment that the UK has numerous cultural assets that generate substantial tourism income but could be marketed better to overseas visitors. Therefore a cultural tourism marketing strategy has been developed which seeks to represent

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and emphasis what are termed the ‘three pillars’ of culture, namely cultural heritage, built heritage and contemporary culture (VisitBritain 2010).

The Greater Region PTB is a cross border marketing project established in 2009 and specifically defines cultural tourism as a key part of its strategic marketing approach. It seeks to market the Greater Region from a cultural tourism perspective primarily through the promotion of a range of themes such as gastronomy; wine and cultural heritage and a joint Greater Region city break strategy (Peters 2012)

No value judgements comparing these respective approaches can be made, partly due to a lack of definitive evaluation studies relating to these. However this comes back to one of the key points made earlier in this study, namely that cultural tourism is a difficult concept to pin down and as such maybe strategically interpreted in a multitude of ways.

6.3.2 Lack of collaboration by respective partners

This was primarily seen in the Greater Region where despite the establishment of a cross-border cultural tourism project, it was pointed out that there was still a practical reluctance for each region to cooperate with each other for the advancement of the project (Peters 2012).

This was also evidenced in the discussions with the Wallonia PTB which, as well as struggling to work with respective Culture and Heritage departments to articulate a cultural tourism strategy, indicated an organisational inability to strategically collaborate with other regions (Duhaut 2012). A sense of competition rather than collaboration between respective PTB was apparent, which given the often cross-border travelling behaviour of tourists, particularly within the Greater Region, is curious.

6.3.3 Little evidence of PTBs working with cultural venues to articulate cultural tourism strategy

There is little evidence within all of the case studies of engagement with cultural venues such as museums when seeking to articulate cultural tourism strategies. A report by the now abolished Museums, Libraries and Archives council in the UK (MLA) from December 2009 demonstrates this by indicating that:

There is a disconnection at the national level between culture and tourism... Ideally tourism should be linked across heritage, museums and the arts. However tourism is often seen as a mass market activity (bucket and spade/fairgrounds) with museums, arts etc being perceived as high culture (MLA 2009:30)

It is fair to say that the Visit Britain cultural tourism strategy, which was articulated a few months after the publication of the MLA report, did incorporate museums, arts etc into the ‘three pillars’ cultural tourism approach. However beyond a recognition of the importance of such venues to the UK’s cultural identity and a focus on the brands of certain major ones, there appears to be little or no consideration of how such venues may contribute toward the advancement of this strategy (VisitBritain 2010)

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The study also indicated that responsibility for the lack of a relationship was borne from both perspectives, and indicating that many cultural venues in the UK (aside from those larger or commercially minded ones) “lack an outward facing approach and tend not to see their institution from the perspective of the tourist, particularly in regard to journeys...and experiences” and also that many simply “do not do tourism” (MLA 2009:4) An exploration by this study into which current tourism strategies were prevalent in UK cultural venues identified a dearth of any useful activity in this area (Turpin 2012)

The MLA study also considered what contribution cultural venues could make to tourism and focused on the need to develop their offer as a ‘product’ to tourists. In particular it found that certain cultural venues “could be viable options to consider...specific approaches to tourism information”. (MLA 2009:36). Its emphasis here was on the possibility of such venues expanding their identities and functions to include tourism, such as using them as Tourist Information Centres (TICs). However could cultural venues not also seek to make their own content and information more easily available to tourists?

6.3.4 Generic definitions of culture

In those examples where a cultural tourism strategy is seen, and is driven by brand, there is a tendency to label the cultural brand in rather generic terms. For example whilst the Greater Region PTB does seek to identify special interest themes that sit across all the regions, such as gastronomy, wine, cultural heritage and festivals, these lack distinctiveness as many other areas in Europe seek to promote themselves along similar lines. The Greater Region’s uniqueness instead stems from the enormous cultural, lingual and historical plurality in a relatively small area (“Europe in a box?”) and this story could be told through a range of cultural assets (whether perceived as narrow and wide). The PTB indicated that the presentation of these generic themes was borne out of the partner regions’ reluctance to collaborate, leading to the lowest common ground of agreement. (Peters 2012)

The Visit Britain cultural brand, whilst not just referring to culture as the mass market activity referred to above in the MLA report, does similarly end up pushing a stereotypical cultural image. Its literature relating to its culture and heritage profile presents numerous images and references to historic buildings, monuments, concert halls, theatres and major London landmarks. These no doubt do comprise a large part of the UK’s ‘cultural’ image, yet there is little engagement with other, more ‘on the ground’ cultural assets like museums, collections content, gallery events and the like.

6.3.5 Conclusions

The analysis detailed above points to the challenges the Proposed Service will face when seeking to collaborate with PTBs on a Europe-wide strategic level to reach cultural tourists. A lack of consistency in strategic approaches, an often non-

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collaborative mind set and a perceived inability to work on a strategic level with cultural venues are all obstacles being faced.

However at the same time there are certain opportunities. The analysis within this chapter also points to a current disconnect between the role of PTB as a strategic driver of cultural tourism and its role as a publisher of content. It has already been seen earlier in this section how content is becoming 'king' again with many brands now becoming content publishers to advance their own strategic goals. Yet this does not appear to be happening with PTBs. The content they seek to engage tourists with at a publishing level does not appear to play much of a role at the strategic level. Could their cultural tourism strategies not be driven by content as well as by brands?

Given the cultural content focus of the Proposed Service, if it can articulate this need effectively to PTBs, it could also present itself as part of the solution. Such a solution would promote more content-focused cultural tourism strategies for PTBs that better link up their respective roles as publishers and strategic drivers. At the same time there is also a strategic opportunity for the Proposed Service to advocate on behalf of cultural venues for a more joined-up cultural tourism strategy representing their interests as well.

7 The Proposed Supply

7.1 Cultural events/venue data aggregators and publishers

7.1.1 Requirements: venue and listings data sources

Aggregators of cultural venue, events and exhibitions data are in some instances also publishers of this information and in other instances are solely data providers to the publishers. In both instances these organisations are driven by the same sets of requirements as their end users are members of the public – cultural tourists in this context. Equally, these requirements, detailed below, apply to both commercial and non-profit aggregators and publishers. They also apply to organisations working within domains informed by location, subject matter or type of provision – for example across a single city, about contemporary art or about historic houses.

The requirements, which must be taken into consideration during the scoping and specification of any service aimed at cultural tourists, can be usefully categorised at two levels – ‘core’ and ‘nice to have’.

7.1.1.1 *Core/essential requirements:*

Without meeting these core requirements even a basic ‘what’s on’ service to inform audiences of opportunities for cultural visits and experiences would not work. They include:

- Accurate geo-locations
- Accurate opening hours/event timings and entrance rates
- Name and a basic description of the venue or event
- Venue or event website url
- Breadth of coverage of relevant domain – ie most cultural venues and events in Brighton; most jazz gigs across London; most museum events nationally

It is worth noting that 100% accuracy or breadth of coverage is not essential. What is important is enough information to create a service or publication strong enough to meet audience expectations. In the case of cultural venues and events it is essential to have as close to complete coverage of high profile and well-known venues and events as possible. These are the listings that reassure users they are looking at a reliable source of information. Added to those a publication or service will ideally also include a rich layer of less well-known information, enough to provide choice and interest.

7.1.1.2 *Nice to have/supplementary requirements*

These are the ‘extras’ – information and content elements that help publishers and aggregators add audience appeal and build services. They include:

- A relevant/interesting/appealing image, cleared for use, at the required size and resolution

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- Subject tags to facilitate discovery, personalisation and sharing
- Target audience information
- Detailed, audience-appropriate, descriptive copy
- Direct route to booking service (if relevant)
- ‘Special offer’ or discount information
- Associated events/venues
- Associated content – video/audio/text

These assertions are based upon Culture24’s extensive experience of operating a cultural venue and events aggregations service that works across subject domains, at local, regional and national level and for multiple venue types and strands of culture. The organisation also publishes this information on a range of websites and has over the last ten years done so in partnership with a range of commercial and non-profit partners for many different target audiences.

7.1.2 Requirements: digital collections data sources

Europeana.eu aggregates collections metadata from institutions across Europe. This piece of research proposes ‘packaging’ digital collections data from Europeana with venue and events data to create the Proposed Service for cultural tourists.

The term ‘packaging’ refers to supporting or supplementing venue and events data with related digitised collections data. The relationship could be direct or tenuous. Connections between the two sets of content might be made through geography, subject matter, promotional theme or simply an editorialised choice. Examples of a direct nature might be items held by or displayed within a venue or as part of an event. Examples of a more tenuous nature are items that relate to the topic of an event or to a specific place indirectly.

This task of packaging cultural venue and events information with digital collections data adds a layer of complexity to the work of cultural venue and events aggregators and publishers, whether they are creating packages of data for publication on their own web pages or to populate an API for a third party. The requirements they have of any source of digital collections data, be that Europeana or another, may be described in similar terms to the venue and events data sources above: they fall into two broad sets – ‘core’ and ‘nice to have’.

This set of requirements (detailed below) relates directly to venue and events publisher and aggregator needs, as suppliers to digital services. However, they are also informed by the needs of the collection holders from whence the collections content originates and the needs of the end users who will be viewing the objects via a digital service.

7.1.3 Core/essential requirements of digital collections data for cultural venue and events aggregators

Without these being met even a basic service to inform audiences about collection items related to cultural visits and experiences would not work. They are essential in order to associate collection items with venues & events data. They include:

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- information about the collection/organisation the item is from (to associate it with its venue)
- a name or title of the item (to present as part of a caption)
- an informative description of the item (to indicate its topicality)
- tags for the subject coverage of the item - ideally including people; places & periods and matching tags/terminologies used by the tourism aggregator (to indicate topicality / relevance)
- information about the creator of the item - if applicable (to present as part of a caption)
- appropriately licensed images of sufficient quality and resolution
- a url to further information about the item (to direct cultural tourists to the collection source)
- Where relevant, information about the rights status of any representations of the item and permitted use of these by end users
- Where relevant, information about permitted use of the content by event and venue aggregators and publishers

7.1.3.1 *Nice to have/supplementary requirements.*

These are the 'extras' – information and content elements that would further help the workflow of touristic aggregators and publishers and improve the user experience for cultural tourists. They include:

- audience-appropriate, descriptive contextual copy
- Information about the items use in or relevance to particular exhibitions/events
- Information about other associated content – video, audio, text
- Information about whether and where the item is on display in the 'real world'

It should be noted that, as opposed to the venue and events data requirements listed on page 65, these requirements around packaging with collections content are assumptions at this stage. They are assumptions based upon Culture24's theoretical exploration of the processes involved. In order to test these assumptions practical piloting is taking place with Europeana content, Culture24's own listings website and Plurio.net's website. This analysis of both technical and editorial requirements will inform the planning of the Proposed Service as our project develops. We have recommended, in section 2 of this report, that close examination of the results of this piloting work be the subject of further research.

7.2 Collections Holders

Brief mention must be made here of the individual museums, galleries, libraries and archives. These collection holders are the source of the digitised collections content which the Proposed Service seeks to interest cultural tourists in. They have not been the primary focus of this report as the Europeana portal will be the supplier of content to the Proposed Service, in practical terms. However, collection holders are of course key stakeholders and their needs have been implicit throughout this research. Key considerations for collection holders in the planning and delivery of any Proposed Service include:

- Their need to honour the rights requirements of all collection items. Even if offered openly as 'shareable' content there may be specified copyright wording which must remain associated with items
- Their need to track, even if only at a high level, the re-purposing and re-publishing of their collections content in order to understand the reach and usage of their collection items beyond their own websites
- Requirements they may have around brand, different collection holders have differing requirements around brand identity when collections are dispersed beyond their own websites

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9 Credits

OUTSTANDING: TO BE COMPLETED