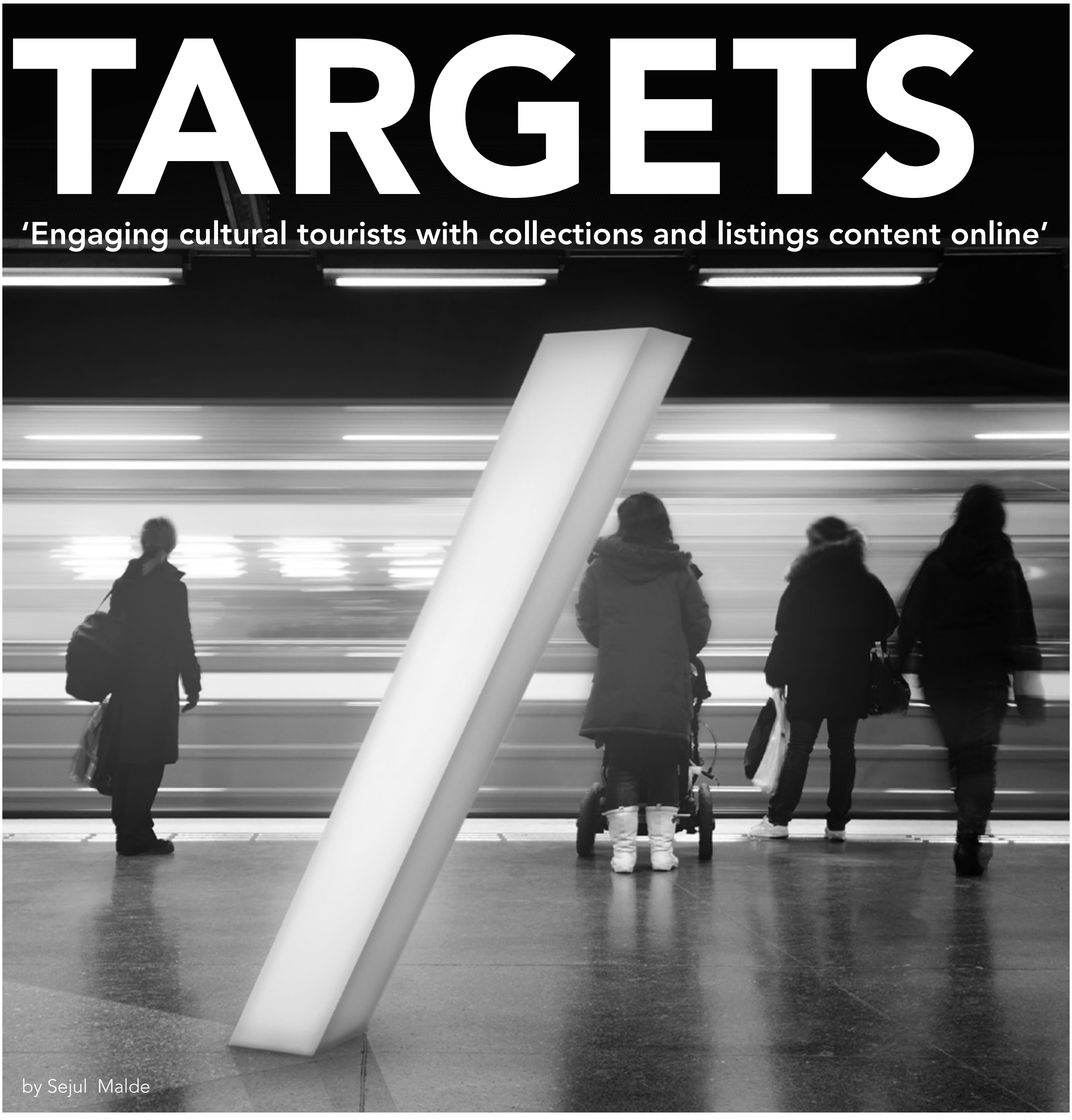
Culture24

A Culture24 Research Report for the Europeana Awareness Project

MOVING TARGETS

'Engaging cultural tourists with collections and listings content online'



by Sejul Malde

A personal foreword from Jane Finnis

We are all tourists, interested, curious and searching for that special moment, that famous place or that personal connection.

The online world, in particular the rise of social/mobile/local is changing our behaviour and how we start, enjoy and remember our individual touristic journeys. Those of us who are cultural tourists carry our love of the object, the artwork or the architecture with us. We seek out stories to resonate with our own and try to package these around our budget, time restrictions and desires. But what role do cultural institutions play in these journeys? Now that Europeana has opened up Europe's vast cultural dataset for unlimited re-use how might this, alongside cultural venue and events listings information, help us map our cultural journeys? What information do we want and is what we find fit for our purposes?

These questions are at the heart of this research in an attempt to understand, analyse and improve the way digital cultural information and collections support the needs of cultural tourists. The result is an insight into these moving targets and the complexities and tensions of these ever-changing technologies, channels and behaviours.

At Culture24 we are passionate about the need for our sector to get real about its data and better understand its value to the public. We hope this research will challenge the notion of a supply-driven service and lead the cultural sector to a deeper appreciation of the complex demands of cultural tourists. We hope it will help us all to think strategically and build the packages and partnerships necessary to spur more online audiences into action and into our venues.

If we're to stand any chance of meeting the needs and understanding the behaviours of our 'moving targets' we are going to need to move with them and towards them.

Jane Finnis
Chief Executive,
Culture24

"…this research will challenge the notion of a supply-driven service and lead the cultural sector to a deeper appreciation of the complex demands of cultural tourists."

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1 Executive Summary

1.1 About this research

This research seeks to identify and evaluate the various user needs that impact on the provision of certain cultural digital content to cultural tourists.

It has been researched and written by Culture24, as part of the Europeana Awareness project. Funded by the European Commission, the project is coordinated by Europeana, the access platform for millions of books, paintings, films, museum objects and archival records that have been digitised throughout Europe.

The particular 'provision' in question relates to the development of a service ('Proposed Service') that aims to package up for use by cultural tourists:

• Metadata and images relating to digitised collections via Europeana

Plus

• Aggregated cultural venue and events information across Europe

Whilst the research findings are primarily aimed towards the development of the Proposed Service, it is hoped that the research may also be of broader use to any other potential provider of content to cultural tourists.

1.2 Research approach

In order to assess the relevant user needs the research undertakes two types of analysis of need: a demand analysis and a supply analysis.

The demand analysis
Of utmost importance when developing a service is that it is **necessary to the end user**. If this cannot be demonstrated it would render the Proposed Service, however well intentioned, utterly redundant.

The development of digitised libraries, as well as cultural tourist services, have historically been led by supply rather than demand approaches, where the end user's needs are rarely understood or engaged with.

A demand analysis of end user needs is therefore essential and is thus the primary objective of this research.

The relevant user analysed here is the **Cultural Tourist**.

The supply analysis
A demand analysis on its own is not enough. As this is a new 'supply market' for the Proposed Service, a secondary analysis of supply needs is necessary to identify the opportunities and challenges faced by existing suppliers of information and content to cultural tourists.

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

The relevant users analysed here are **Commercial Tourism Publishers, Public Tourism Bodies, Cultural Venue/Events Data Aggregators and Collection Holders.**

The methodology
The research methodology adopted by this study is a combination of literature review, user interviews and case studies.

1.3 Recommendations

Recognise that designing services for cultural tourists is challenging as they represent a **'moving target'** whose identity, motivations and behaviours can vary considerably.

Adopt a **demand led approach** that keeps asking the question: why would a potential cultural tourist be interested in using the service being provided?

Identify clear **niches of use** and **tailor services** to meet these, rather than attempting a 'one size fits all' approach for the mass tourist market.

Only supply **content/information** of a **high standard** that is engaging, 'sticky', rich, shareable (technically and legally) and up to date.

In a rapidly changing digital information landscape, keep continually abreast of changing demand and supply driven needs and **design adaptable services** that are better equipped to meet these changing needs.

Think big but act small – focus on smaller, more manageable and easier to get off the ground solutions and services.

Keep evaluating success or failure by measuring **impact** of services and user engagement rather than just outputs and outcomes.

1.4 The strategic demand analysis

Cultural tourism is a very difficult concept to pin down, encompassing as it does a broad range of interpretations and definitions.

Recognising these challenges yet taking ownership of a clear definition for a target cultural tourist market is essential.The suggested definition of cultural tourism for the Proposed Service 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.***

This definition is very end user focused as it seeks to explore cultural tourism and cultural tourists based on their **motivations** and **consumption behaviours**.

The motivations of cultural tourists

A broad range of motivations can bring people into contact with culture when they travel.

These can include:

• '**Classic**' motivations of 'Culture Vultures' and 'Cultural Sightseers', as well as

• '**Postmodern**' motivations, linked to expressions of individual identity, quests for meaning, special interests and so on

There also times where motivation is not important because someone "serendipitously" engages with culture whilst on their travels.

The exact nature of the motivation or experience is not important from a cultural tourist perspective, but rather that it has some deep value to the individual.

Purposeful, Serendipitous and **Sightseeing** motivation types are relevant to the Proposed Service, as these reflect deep motivations or deep experiences.

Those with deep motivations could include '**Culture Vultures**', '**Cultural Sightseers**' and "**Special Interest Tourists**", but target motivations are not limited to these alone.

The consumption behaviours of cultural tourists

Tourism within Europe is growing again after recent decline caused by the global recession. It is estimated that cultural tourism accounts for approximately 40% of all European tourism.

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.

A recent rapid increase of visitor from BRIC countries is bringing fresh demand for Europe's cultural sites.

More local, more frequent and shorter travel (such as day trips) are becoming increasingly popular within Europe.

City breaks are also becoming increasingly popular within Europe. Such breaks are often equated with a demand for cultural tourism based on visitation to cultural venues.

People working in jobs connected to the cultural sector tend to engage in cultural tourism more frequently.

A range of 'special interest tourism' niches are developing, as certain cultural venues attempt to attract tourists with special interests. These include but are not limited to:

• Creative tourism

• Dark tourism

• Industrial heritage tourism

• Gardening tourism

Over 55s and under 30s age groups are most likely to go on city breaks and visit cultural venues and are key target age groups.

User profiles identified for the Proposed Service that seek to incorporate the key target motivations and behaviours include:

• 'Culture Vulture' city break tourist

• 'Cool' city break tourist

• "Special Interest" tourist, including particular interests in:
    • World War One
    • Gardening
    • Industrial Heritage

• 'Cultural Professional' tourist

• 'Family' sightseer

• International tourist

These user profile describe 'roles' rather than exact 'person types' of tourists. Therefore it is not appropriate to target **people** to fit these profiles, but instead target the **behaviours and motivations** underpinning them.

1.5 The content demand analysis

This analysis seeks to understand how cultural tourists currently **engage** with content/information and what they **require** from it.

Understanding how users engage with content/information is difficult because 'engagement' is also another slippery term. The way we behave with information has changed fundamentally since the advent of the digital age. The way to define engagement is therefore to focus on the changing behaviours of audience. The key question to ask is therefore 'what are the information behaviours of cultural tourists'?

It is difficult to say whether cultural tourists, as a specific sub-set of tourists, would engage with information differently to other groups of tourists.

These information behaviours are changing rapidly and as such this analysis can only represent a snapshot in time. Online research of information is now an established behaviour amongst tourists and demonstrates how behaviours can change within a short time.

Tourists are increasingly focused on using online search as a way of accessing information. Therefore SEO strategies are a consideration for the Proposed Service.

Use of mobile technologies by tourists will increase as connectivity improves and roaming charges reduce, and as a result, 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.

Word of mouth recommendation remains the most popular source of information for tourists and it will be interesting to understand if this translates itself digitally into greater usage of social media networks for gathering tourist information in the future.

Non-digital information forms e.g. printed guidebooks are still very popular, and have not yet been fully replaced by other digital forms.

There is a desire from many tourists not to overplan and thus rely on serendipity and inspiration.

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.

Peer review websites, public tourist body websites and cultural venue websites are popular amongst cultural tourists when gathering information.

1.6 The existing supply analysis

Relevant trends impacting existing content publishers include:

• **The shift to digital** – digital has now been accepted as an underlying force within the publishing sector.

• **The advent of SoLoMo** – referring to the convergence of technologies focusing on the social, local and mobile.

• **Content is king again** - there is strong recognition that engaging, 'sticky', rich and shareable information is fast supporting the publisher's brand as a way of reaching customers.

• **The increase of user generated content (UGC)** - UGC has continued to grow in value and impact for tourism publishers.

• **Engagement with user's complete information journey** – publishers are viewing the tourist's complete "arc" (planning to post-trip and memories) as an opportunity for continued provision of information and engagement.

TripAdvisor leads the shift to digital amongst tourism content publishers and has embraced the advent of SoLoMo actively. Its dependency on UGC has expanded its content and number of users dramatically in recent years.

Users are increasingly seeking out 'expert' content as a way to navigate 'untrusted' UGC and TripAdvisor is looking for ways to address this issue.

Traditional tourist publishers who retain a legacy 'print v digital' mindset and don't adopt a more platform-neutral approach will struggle.

Lonely Planet appears to have embraced this shift wholeheartedly whereas Rough Guides has struggled in comparison.

Lonely Planet and Rough Guides' content asset is their editorial content. The key question for these publishers is whether the rise of UGC devalues their own 'expert' editorial content?

TripAdvisor, Rough Guides and Lonely Planet all provide cultural venue listings, but not cultural event listings. This presents an opportunity for the Proposed Service.

Public tourist body websites demonstrate how promoting a distinctive purpose has enabled them to remain relevant to tourists. However as they appear to lag behind in the shift to other forms of digital publishing and content, will they continue to remain relevant to tourists?

Public tourist body websites focus on editorial content to reflect their expert 'voice'. This is comparable to traditional commercial publishers; therefore similar questions about the future of this content type apply.

Lack of consistency in strategic approaches, a non-collaborative mindset and a perceived inability to work strategically with cultural venues, are all obstacles when seeking to strategically engage with public tourist bodies.

Public tourist bodies often lack a content-driven cultural tourism strategy. This presents an opportunity for the Proposed Service to collaborate at a strategic level.

1.7 The proposed supply analysis

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.

Collection holders will have their own separate requirements of any Proposed Service, these must also be considered at all stages.

*Recognise that designing services for cultural tourists is challenging as they represent a '**moving target**' whose identity, motivations and behaviours can vary considerably*

2 Introduction

2.1 Research context

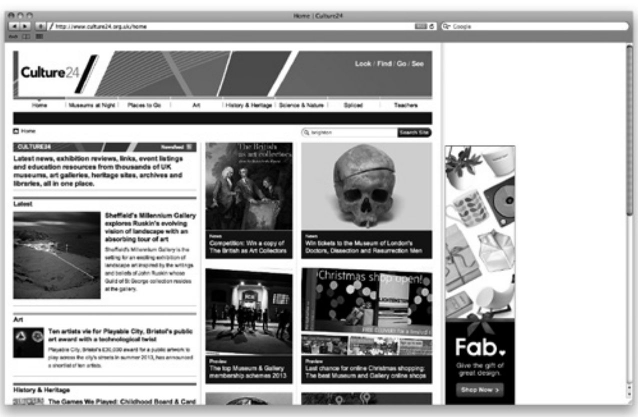
This research has been commissioned by the Europeana Foundation, the governing body of the Europeana service, a single access point to millions of books, paintings, films, museum objects and archival records that have been digitised throughout Europe.

© www.europeana.org

The research forms part of a wider programme of work, the Europeana Awareness programme. Culture24 is working with partners across Europe on one element of the programme 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 funded by European Commission.

Culture24 has collaborated with Plurio.net in undertaking this research.

Culture24 is a non-profit 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 explore how arts and heritage venues engage with their audiences digitally. www.weareculture24.org.uk



Culture24 publishes www.culture24.org.uk.

Plurio.net is a public cultural publishing service based in Luxembourg, existing to facilitate access to cultural information about the Greater Region (a cross border region in the heart of Western Europe). It collects and disseminates cultural venue and events information of the Greater Region across its own portal as well as via numerous other cross border channels and networks. www.plurio.net

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2.2 Research context

It is proposed that certain digital cultural content, namely:

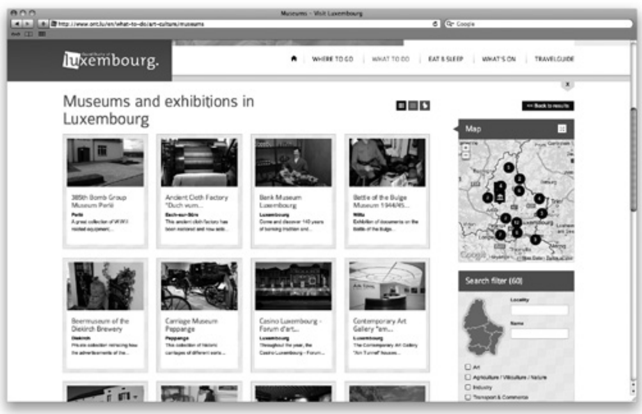
• Metadata and images relating to digitised collections via Europeana ('Europeana Data')

AND

• Aggregated cultural venue and events information across Europe ('Listings Data')

may be made accessible to the cultural tourist market by developing a service to supply this content to cultural tourists **('Proposed Service').**

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.



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'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 and so on.

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 driven' in this respect relates to the demand and supply of information and data. **In order to determine these strategic and content driven challenges and opportunities, the user needs of the current cultural tourist market must be explored**. An analysis of these user needs is the fundamental objective of this research.

Whilst the research findings are primarily aimed towards the development of the Proposed Service, it is hoped that the research may also be of broader use to any other potential provider of content to cultural tourists.

2.3 What type of needs analysis?

A demand analysis

It is of utmost importance 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 intentioned, utterly redundant.

It is interesting to note that in both the development of services focusing on digital 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-led rather than demand-led approaches are favoured with little 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 and combine 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 research**.

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

2.4 Who are the users?

Users have been identified within a hierarchy of importance to this project according to their particular roles within the potential 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

2.5 What are their '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 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
    - 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

The diagram explains how the Proposed Service may interact with these various users and their respective needs.

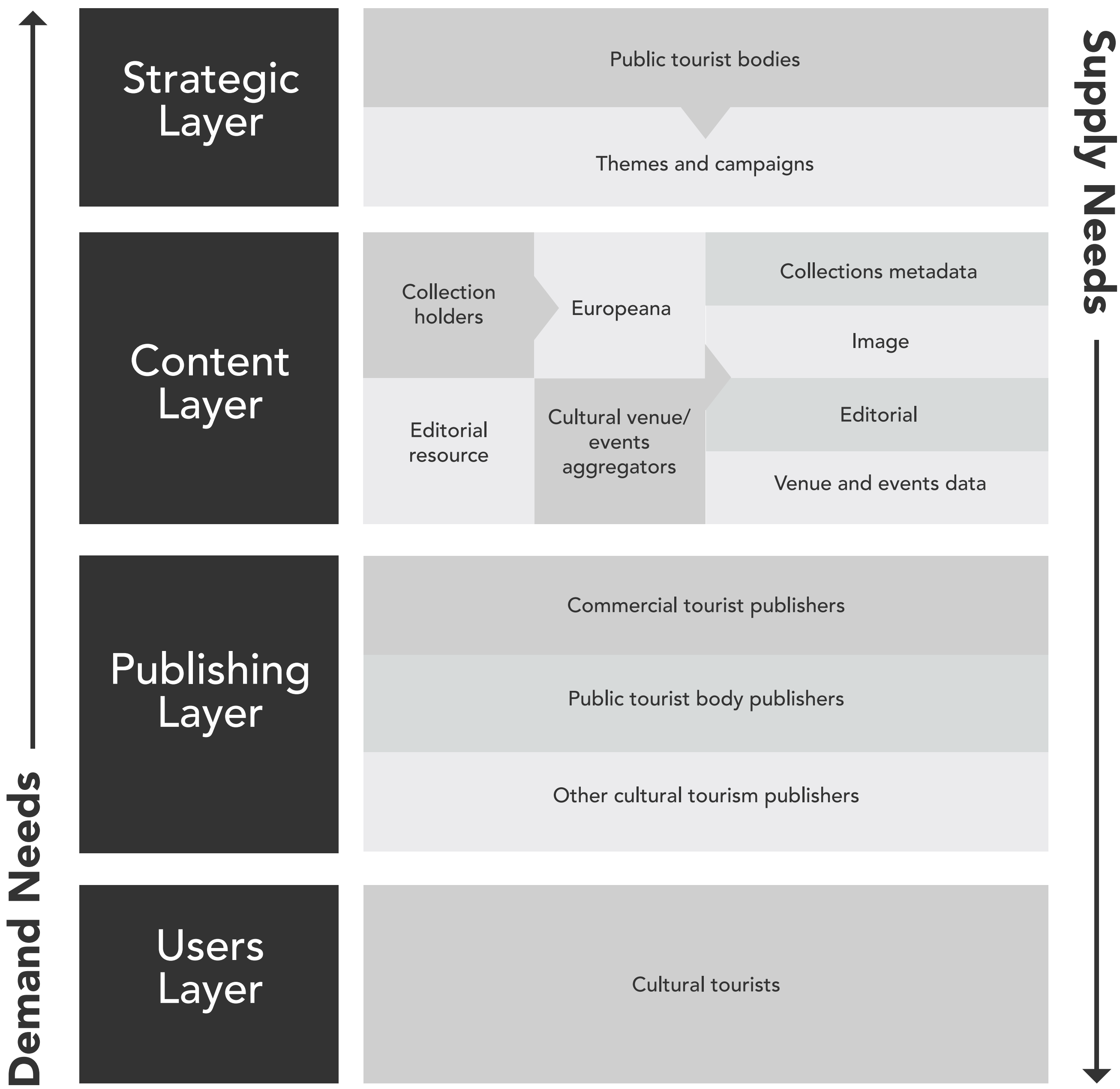

Figure 1

2.6 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 described above. These can be summarised as follows:

The demand analysis
• What is the target market for the Proposed Service?
  • Who are cultural tourists?
  • What are the target motivations of cultural tourists?
  • What are the target consumption behaviours of cultural tourists?

• Can the Proposed Service pass useful content/information to the end user?
  • What are the information behaviours of cultural tourists in connection with their trips?
  • What types of information do cultural tourists look for 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?
  • 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 of cultural venue and events data aggregators?
  • What are the data requirements of digitised collections holders?

2.7 Scope

Geography
It is beyond the scope of this project to look at each element of this research in the context of the EU as a single entity or for each and every individual country within the EU. Therefore, unless specific information in this context is available, information is either not geographically specific or focuses upon countries where data is most accessible to Culture24 and Plurio.net, namely the UK, Germany, France, Belgium or Luxembourg.

Information behaviours
Behaviours in connection with the specific acts of booking/buying trips have been specifically excluded from analysis, as they fall beyond the scope of behaviours that might respond to the Proposed Service.

Also, any focus on information exchange at cultural venues, e.g. exhibition interpretation, is out of 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.

Deeper research
The following deeper investigations are out of scope of this current research, but are recommended areas for future research

• Detailed investigation into how cultural tourists are using mobile technologies to gather and share information

• Detailed investigation into 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

It is interesting to note that in both the development of services focusing on digital 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.

3 Findings

3.1 The key findings

The Proposed Service must take account of the following findings:

• The specific and detailed needs of target end users are fundamental considerations when planning any digital service

• Cultural tourism is a very difficult concept to pin down, encompassing as it does a broad range of interpretations and definitions. Taking ownership of a clear definition for a target cultural tourist market is essential

• The target market definition should be based on user motivations and behaviours rather than defined 'profile types'

• Three key target motivations of cultural tourists should be 'purposeful', 'sightseeing' and 'serendipitous'

• Six key target behaviours of cultural tourists should be 'city breakers', 'special interest travellers', 'day-trippers', and those relating to 'over 55s', 'under 30s' and 'cultural professionals'

• The digital information-seeking behaviours of tourists are changing rapidly, particularly around mobile technologies, thus any Proposed Service should be adaptable and iterative

• Tourists need cultural venue and events listings information that is up-to-date, local, niche, tailored to their requirements, easily discoverable and easily navigable

• Whilst there is some awareness currently of digitised collections content amongst tourists, there is little usage of or engagement with it currently

• Tourists need information both before and during their trips and are keen to share information afterwards

• 'SoLoMo' - Social Local and Mobile convergence is a strong influence on digital publishing platforms

• 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

• 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

• 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

• Lack of consistency in strategic approaches, a non-collaborative mindset and a perceived inability to work strategically with cultural venues are all obstacles that the Proposed Service could face when working with public tourist bodies

• There are clear, 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

• Collection holders have their own separate requirements of any Proposed Service, these must be considered at all stages

3.2 The key recommendations

• Recognise that designing services for cultural tourists is challenging as they represent a 'moving target' whose identity, motivations and behaviours can vary considerably

• Adopt a demand led approach that keeps asking the question: why would a potential cultural tourist be interested in using the service being provided?

• Identify clear niches of use and tailor services to meet these, rather than attempting a 'one size fits all' approach for the mass tourist market

• Only supply content/information of a high standard that is engaging, 'sticky', rich, shareable (technically and legally) and up to date

• In a rapidly changing digital information landscape, keep continually abreast of changing demand and supply driven needs and design adaptable services that are better equipped to meet these changing needs

• Think big but act small – focus on smaller, more manageable and easier to get off the ground solutions and services

• Keep evaluating success or failure by measuring impact of services and user engagement rather than just outputs and outcomes

4 Methodology

The research methodology for this user needs analysis adopts a combination of literature review, user interviews and case studies.

4.1 Literature review

4.1.1 Objectives
Literature review is used as the primary research approach to draw upon the key themes and trends impacting on each research question.

4.1.2 Sources
For the demand analysis, literature from three main sources is explored:

- Cultural tourism texts
  - Specifically relating to conceptual issues, market trends and user studies

- General tourism texts
  - 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 two bodies of literature:

- General digital publishing texts
  - Specifically relating to market trends

- E-tourism texts
  - Specifically relating to market trends

4.1.3 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.

4.2 User interviews

4.2.1 Objectives
User interviews were conducted by this study to supplement the literature analysis when seeking to explore cultural tourists' information behaviours and requirements.

4.2.2 Sources and process
100 interviews were conducted in total. 54 of these were conducted within the UK and the remainder were conducted within various locations within the Greater Region.

The interviews 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 interviews were semi-structured, and allowed for some quantitative and qualitative analysis.

A logical and considered methodology was followed in choosing interviewees, based on Culture24 and Plurio.net's previous experience and contacts in this area. It was important to select interviewees that were likely to demonstrate the target cultural tourist motivations and behaviours based on the profiles detailed in section 5.5. With this in mind the following approaches were adopted when seeking to do this:

- Identify interviewees who tend to visit cultural sites

- Identify a proportion of interviewees who are over 55 or under 30

- Identify a proportion of interviewees who work in the cultural sector

- Identify a proportion of interviewees with young families

- Conduct interviews with visitors at a variety of different types of cultural sites. These sites were:
  - Imperial War Museum, London (UK)
  - Kew Gardens, London (UK)
  - The Garden Museum, London (UK)
  - Brighton Pavilion, Brighton (UK)
  - Museum of London, London (UK)
  - World Heritage Völklinger Hütte Steel Works, Völklingen (DE)
  - Centre Pompidou, Metz (FR)
  - The Grand Place, Brussels (BE)

- Conduct all interviews at cultural sites within cities

- Conduct interviews at cultural sites likely to attract special interest tourists in the categories described (in section 5.5) within the target profiles

4.2.2 Advantages and limitations
Due to the difficulties of identifying and defining cultural tourists (as outlined further within this report), it was felt that adopting a user survey methodology that aimed to be representative of such a variable group was not a reliable approach.

To retain any credibility, and in order to compare with many of the other survey studies contained within the literature, such a survey would need to have been vast in terms of sample size and very accurate in terms of completion rate, which given resource constraints would have been impossible.

User interviews were instead chosen due to their ability to highlight indicative opportunities and challenges from the cultural tourist population rather than representative ones. Also given that this is the first piece of research seeking to explore the potential relationship between cultural tourists and the Proposed Service, the exploratory nature of user interviews represents a more appropriate line of enquiry.

4.3 Case studies

4.3.1 Objectives

The case study methodology was used within the supply analysis to explore the needs of public tourism bodies and commercial publishers and seeks to complement the literature review in these areas.

4.3.2 Sources and 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 the relevant section.

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

4.3.3 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 the existing supply analysis, depth rather than breadth was a better approach. Focusing on case studies enables this to happen. As such any opportunities and challenges that can be drawn from this analysis are intended to be indicative rather than conclusive.

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…

Painting - The Wedding at Cana by Paolo Veronese, Louvre Museum, Paris" by fmpgoh/flickr/CC by NC-ND 2.0

5 Demand Analysis (Part 1) – Strategic Demand

Chapter summary

The strategic demand analysis confronts the definitional and conceptual challenges presented by 'cultural tourism' before proposing a workable definition based on cultural tourist motivations and behaviours. Each of these is analysed in the context of relevant tourism literature.

Motivations are analysed in the context of literature detailing 'classic' tourism motivations and 'postmodern' tourism motivations, before identifying a range of target cultural tourist motivations for the Proposed Service.

Behaviours are analysed in the context of current trends detailing the consumption activity of cultural tourists, before identifying a range of target cultural tourist behaviours for the Proposed Service.

Finally the target motivations and behaviours are incorporated into target user profiles that should be used strategically by the Proposed Service going forward.

5.1 Introduction

An end user strategic demand analysis is performed in order for the Proposed Service to identify any strategic 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 consumption behaviours of cultural tourists?

5.2 Who are cultural tourists?

Definitional challenges

"There are as many definitions of cultural tourism as there are cultural tourists"
(McKercher and Du Cros 2002).

This presents a conceptual challenge, as to understand who cultural tourists are, an understanding must be reached as to what exactly cultural tourism is. The question is riddled with interpretive difficulties. Greg Richards notes that "one of the few areas of certainty in cultural tourism is the difficulty of defining it" (Richards 1996:45), whilst the International Council on Monuments and Sites highlights that "cultural tourism as a name means many things to many people and herein lies its strengths and weaknesses" (ICOMOS 1996:17).

Isaac indicates that the cause of this definitional difficulty is in the "broad meaning of the terms 'culture' and 'tourism' as well as the changing role of cultural tourism itself" (Isaac 2008: 4). In particular the presence of the term 'culture' generates much complexity. As Raymond Williams famously noted "culture is one of the two or three most complicated words in the English language" (Williams 1983). When it comes to tourism, culture can be interpreted narrowly - visiting and engaging with art, museums and their ilk; or widely - encompassing a place's people, habits, customs, dress, food and so on. 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).

Seeking to reach out to "cultural tourists" is therefore fraught with conceptual and definitional challenges. **For the Proposed Service to move forward positively it is important to recognise and confront these challenges yet at the same time take ownership of a clear definition that can work for its objectives.**

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A proposed definition

An analysis of the literature reveals that two definitional categories of cultural tourism are common. Examples of both of these can be seen in the work of the European Association for Tourism and Leisure Education (ATLAS).

The first category represents **motivational** based definitions. These 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 category represents **product** based definitions. These 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, as both can be used as a basis upon which to explore needs from an end user perspective. On the one hand the motivational 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.

The definition of 'cultural venues or attractions' used by this research will refer to **museums, art galleries and cultural heritage sites**, as the Proposed Service specifically relates to cultural content sourced from, or related to, these sites. Therefore, the proposed definition of cultural tourism for this study seeks to combine both ATLAS definitions and our definition of cultural venues, such that cultural tourism is defined as:

"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**"

Based on this definition, the strategic needs of cultural tourists can be analysed in terms of motivations and behaviours. The two key questions to explore as part of this strategic demand analysis are therefore:

• 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.

5.3 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 explored in turn in the context of both general tourism and cultural tourism.

5.3.1 The 'classic' motivation

Relating to tourism generally

Discussion within the literature relating to 'classic' motivation, stems from a notion of tourism being socially determined, involving extrinsic motivations that are formed by the tourist's social environment (Heitmann 2011:43) and adhering to a rigid standardised type.

This is evidenced as far back as the 17th century Grand Tour where upper class men, responding to the social norms of class and custom, took a standard itinerary trip through Europe visiting many of its cultural sites and cities. Whilst a rite of passage for an elite few, the Grand Tour also responded to the learning and enlightenment motivations of that age.

© British Connaisseurs in Rome Ölgemälde" by James Russel /Wikimedia Commons / Public Domain

Although 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 similarly driven by rigid (yet different) motivations, and also adhered to standardised forms.

© Sunbathing on a Kos beach" by hofman01/Wikimedia Commons /CC by SA 2.0

Relating to cultural tourism specifically

Elements of these 'classic' motivations are present within cultural tourism in the form of 'Culture Vultures' and 'Cultural Sightseers'.

The former refers to people who are highly motivated to travel to visit museums, art galleries and cultural heritage sites in order to advance their own cultural knowledge and learning. It could be argued that socially derived needs in the form of cultural capital, class and education are prevalent in their motivations.

Fine Arts Exhibition in Warsaw in 1828 by Wincenty Kasprzycki?Wikimedia Commons/Public Domain

The latter refers to individuals who are motivated to travel to visit the ‘must-see’ cultural monuments and sites in any area, with the specific motivation not to miss out on the widely renowned cultural highlights.

“Paris tourists” by zoetnet/Wikimedia Commons /CC by 2.0

5.3.2 The ‘postmodern’ motivation

Relating to tourism generally

Discussion within the literature relating to ‘postmodern’ motivation stems from a notion of tourism being driven by individual choice, involving motivations that can be considered from a more intrinsic perspective, allowing for individual differences (Heitmann 2011:43).

This is rooted in the shift away from standardised mass-market supply-driven principles to 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 a broader and more personalised set of wants and needs based on meaning and purpose, that are driven by a 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 trips. For example Croatia with its plentiful rivers, mountains and coastline has become a magnet for holidays offering kayaking, sailing, rafting and scuba diving activities (Epicadventurer.com 2012).

“Sunsets on Clearyland” by Phil Dragash/flickr /CC by NC-SA 2.0

The breadth of individual wants and needs means that a whole host of other motivations can impact on the modern day tourist. Not all of these may be deeply rooted in a desire for self-meaning, purpose or experience but instead can be driven by a need for hedonism, leisure or relaxation.

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 themselves ‘cultural tourists’ and those who do not specify a particular interest in the arts or cultural tourism is 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 wanting to relax all relegated the classic cultural tourism motivation of learning to last place (Richards 2007). This broadening out of cultural motivations for travel appears to be increasing as a result of postmodern fragmentation.

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 and more) relating to specific facets of culture that appeal to subsets of tourists (for further discussion please see section 5.4.7).

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 or tourists on a city break may stumble across a monument during an exploratory walk. Such tourists' cultural experiences rely on serendipity rather deep motivation. Yet the depth of their own experiences engaging with, say, objects in a museum, could be as strong as someone who travelled specifically to view them. In such cases it seems that depth of experience rather than depth of motivation becomes relevant from a cultural tourism perspective.

Also the type of experience could be wide-ranging. Whilst it could relate to a deep engagement with museum objects it could also relate to a fondness for the venue's overall atmosphere. 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).

5.3.2 Target motivations of cultural tourists

From the discussion above certain outcomes 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 to cultural tourists is not the exact nature of the motivation, but rather that it represents a strong desire to engage

• There also times where motivation is not important because someone "serendipitously" engages with culture whilst on their travels, resulting in a personally rewarding experience

• What is important to cultural tourists is not what the experience is, but rather that it has some deep value to the individual.

The 'McKercher and Du Cros types' provide a good way to analyse these outcomes by comparing motivation against experience.

(McKercher and Du Cros 2002)

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 motivations such as 'Special Interest Tourists'. But target motivations are not limited to these alone.

5.4 What are the consumption behaviours of cultural tourists?

This analysis is largely based on measurable user studies and statistics that explore cultural tourism from the perspective of visitation to cultural venues (usually museums, galleries and heritage sites). The key trends that can be drawn from this literature are detailed below.

5.4.1 Importance to the European tourist market of visits to cultural venues

Official figures from the EU show a decline in tourism for most European countries since 2008 but in the last year there has been evidence of growth moving towards a full recovery (ETC 2011). A large part of this resilience is fuelled by cultural tourism. 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).

5.4.2 Impact of cultural tourism from BRIC countries

Aligned with the importance of visits to cultural venues to the European tourism market is the rapid increase in visitors from 'BRIC' countries (Brazil, Russia, India and China). Visitor numbers from these countries to Europe have increased by "high double digit rates" in the last year (ITB 2012). These visitors are bringing a fresh demand for Europe's cultural sites, not only as part of sightseeing tours but as part of a growing desire for individual experience based cultural tourism (ITB 2012).

5.4.3 Continued popularity of museums and cultural heritage sites

Whilst many commentators argue that tourists are 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, were in contrast visited by relatively few tourists (Richards 2007).

5.4.4 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 European Travel Commission found that 'culture is the single most important motivation for city trips, although relatively few visitors view themselves as cultural tourists'.

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. Younger travellers to cities tended to be the 'omnivorous' consumers described above, engaging with a broad range of cultural forms including but not limited to museums, galleries etc. 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).

5.4.5 'Busman's cultural tourism'

The most recent ATLAS survey identified 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 than other groups. It discovered that a significant proportion of 'cultural tourists' surveyed (30%) had an occupation connected with culture (Richards 2007), compared with about 3% of the EU population and this has increased from 24% in the 2002 survey (Richards 2003).

Whilst there has been no research tracking this since, it seems clear from these results that people who work in the cultural sector are more likely to travel for cultural reasons. They therefore cannot be ignored in the context of cultural tourism and represent an important target market for the Proposed Service.

5.4.6 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.

This demand for shorter, more local and more frequent holidays has manifested itself in a large increase in day trips (ITB 2012). For example 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).

5.4.7 Growth of special interest (niche) travel

This was referred to 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 cultural venues, as they seek to attract such special interest tourists. 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).

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 now be referred to as creative tourism (European Council 2011). However, this form of participatory tourism may present a challenge for the Proposed Service, as it is possible that those who are likely to be driven by 'active' participatory holidays are less likely to want to engage with the arguably more 'passive' activity of engaging with collections content.

Dark tourism

The concept of 'Dark tourism' has become increasingly referenced 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
- 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 is yet to have been picked up by the tourism industry as a niche market perhaps due to an 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 military history or World War One 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. The 2011 edition of European Tourism Day organised by the Commission focused specifically on Industrial tourism for example. (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, especially within Europe.

For example, at the time of writing this report, the world's leading horticultural exposition had just finished in the Netherlands and attracted two million visitors. In the Loire Valley, the festival at Chaumont-sur-Loire, as well as the Journees des Plantes biannual garden festival, also attracted significant tourist visitors (Packe 2012). In the UK the popularity of Gardening tourism was demonstrated by the 'English Garden' winning the award for Outstanding Contribution to Tourism at the Visit England Awards for Excellence 2012 (Visit

England 2012b), as well as the Royal Horticultural Society also planning to launch a range of garden holidays for 2013.

5.4.8 Relevant age 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 age-related trends to assess if this may continue.

A key trend is an ageing society. It is predicted that in 2020 the elderly will be in the majority in Western Europe (Gottlieb Duttweiler 2006). There appears to be high travel participation within the higher age group. For example a recent study found 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). One prediction is that the group of potential travellers older than 55 will grow significantly (ETC 2005: IX).

Given the perceived levels of cultural tourism activity of this age group, these trends clearly present this group as a potential target market for the Proposed Service. However an eye should be kept on the future travel behaviours of this group as it is possible that 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, many in this group may not be as affluent as once thought (Ryan 2010:16). This may affect their potential future participation in cultural tourism as current 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, as with the older group, the future travelling behaviours of Generation Y should be continually assessed as the potential combination of income uncertainties, reducing leisure time for holidays and increased competition from other leisure and entertainment sources could impact their future travel behaviours (Ryan 2010:16).

5.4.9 Target consumption behaviours of cultural tourists

Certain key conclusions can be drawn from the discussion above about the target consumption behaviours of cultural tourists in relation 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

• Don't preclude local travel and day trips as they are becoming increasingly popular

• City break visits should be a key focus, due to their relevance to Europe, their popularity and their connection to cultural tourism

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

• Over 55s and under 30s should be targeted due to their likelihood of visiting cultural venues and also of taking city breaks

• Visitors from BRIC countries should be targeted as this is an important growing market not only for European tourism, but also for visitation to cultural venues within Europe

• People who already work within the cultural sector should be targeted as they are very likely to engage in cultural tourism.

5.5 Conclusions

Based on the examination of target motivations and consumption behaviours of cultural tourists covered in the last sections, the following user profiles of potential target cultural tourists, which the Proposed Service may wish to consider from a strategic perspective, are proposed:

- 'Culture Vulture' city break tourist
  - Visits cultural sites
  - Over 55
  - Purposeful motivation type
  - Classic cultural tourist motivation
  - Goes on city breaks

- 'Cool' city break tourist
  - Visits cultural sites
  - Under 30 (Generation Y)
  - Serendipitous motivation type
  - Goes on city breaks

- 'Special Interest' tourist
  - Visits cultural sites
  - Purposeful motivation type
  - Motivated to travel by deep niche interest in, for example:
    - Industrial heritage
    - Gardening
    - World War One

- 'Cultural Professional' tourist
  - Works in cultural sector
  - Visit cultural sites for professional or leisure reasons
  - Purposeful motivation type

- 'Family' sightseer
  - Visits cultural heritage sites
  - Sightseeing motivation type
  - Works in the cultural sector
  - Has young family and takes them on trips
  - Tends to travel domestically and on day trips

- International tourist
  - Visit cultural sites
  - Resident of a 'BRIC' country
  - Sightseeing motivation type

It is important to note that these profiles are based primarily on behaviours and motivations (with the exception of the factors based on age, children and nationality - which are nonetheless drivers of behaviours). **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).

The Proposed Service should not therefore target people who fit these profiles but rather the behaviours and motivations that underpin them.

The Proposed Service should not therefore target people who fit these profiles but rather the behaviours and motivations that underpin them.

6 Demand Analysis (Part 2) – Content Demand

Chapter summary.

The content demand analysis seeks to explore how cultural tourists currently engage with information in connection to their trips and what they require from it.

The difficulty of assessing 'engagement' is acknowledged before relying on an approach that seeks to identify the relevant information behaviours of cultural tourists as a method of assessing this.

Information 'requirements' are defined as the type of information sought out by cultural tourists.

The analysis then explores in detail, through a review of literature and supplementary user interviews, the relevant information behaviours and the types of information sought out by cultural tourists.

6.1 Introduction

6.1.1 What is the content demand?

The second part of the demand analysis explores the relationship cultural tourists have with information in connection to their trips. In interrogating this relationship, this study aims to understand how cultural tourists currently **engage** with content/information and what they **require** from it.

'Engagement' is another slippery term. How should it be defined for these purposes? Locke argues that the way we engage with information has changed fundamentally since the advent of the digital age, from a unified, linear and structured form of engagement to one more varied, networked and dispersed. This signals a critical shift in our information behaviours and Locke therefore stresses that the "way to define engagement is by the changing behaviours of our audience" and "if you want engagement …design for behaviours" (Locke 2012).

Information requirements differ from behaviours, as they do not refer to **how** cultural tourists engage with information but rather **what type** of information is specifically sought after. Therefore the two key questions interrogated by this analysis are:

• What are the relevant information behaviours of cultural tourists in connections with their trips?

• What types of information do cultural tourists look for in connection with their trips?

6.1.2 Approach

There is a wealth of literature that seeks to document the information behaviours and requirements for tourists overall, incorporating wide ranging surveys focusing on tourist consumer use of travel information. There is however little specific focus within the literature on studies that examine the information behaviours and requirements of individual subsets of tourists (such as cultural tourists) beyond those based purely on demographics.

This could be because it is difficult to say that cultural tourists as a specific subset of tourists (based on their motivations and consumption behaviours as discussed in the last section) would engage with information any differently to other groups of tourists. Whilst this particular question could be the subject of further detailed enquiry, it would require a survey methodology comparable to those undertaken for the general tourist population which, due to time and resource constraints, were impossible to undertake in this study.

Therefore for the content demand analysis conducted here, it will be assumed that **the information behaviours and requirements of the general tourist population apply to cultural tourists specifically**. Consequently the literature analysed will relate to the various user studies conducted for 'general tourists' in this area.

To improve the relevance of this analysis to the Proposed Service it will, where possible, focus on studies relating to EU tourism or EU tourists as well as studies examining the information behaviours of tourists from UK, Germany and France (as they relate to the three major European tourism markets and overlap with the UK and Greater Region focus of this study).

In addition to this literature analysis, the key findings from the user interviews conducted by this study are also examined. Whilst the outcomes from these interviews are not claimed to be representative of all cultural tourists, they do seek to illustrate the likely perspectives of cultural tourists (including those that may fulfil the user profiles detailed in the last section). They are therefore used to supplement or query the findings of the literature analysis and identify potential future lines of research.

For more information on how the respondents for interviews were selected please refer back to section 4, research methodology.

6.2 What are the relevant information behaviours of cultural tourists?

6.2.1 Online research

The literature confirms that online research is an increasingly popular information gathering behaviour for tourists. For example 85% of travellers from France, Germany or the UK used the Internet as one of their sources for destination selection and this is increasing year-on-year (PhoCusWright 2011). Also 40% of EU citizens cite websites as the most important source of information in their decision-making process in connection to travel (EC 2012).

The common assumption of only younger tourists using the Internet as a source of information is being challenged, with recent findings showing that those over 55 are more likely to book their whole trip online than tourists of younger age groups (Travelsphere 2012).

Another recent study sought to separate out the "destination selection" stage from the "trip planning" stage and identified the Internet as popular in both cases but used more in planning a trip (57%) than for deciding a destination (36%) (Bowker 2012:38).

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

© "Neon Internet Café open 24 hours" by Justinc/Wikimedia Commons?CC by SA2.0

Almost all of the user interview respondents indicated that at least some of their research prior to travelling was done online, irrespective of age or background. This would seem to support the findings from the overall literature in confirming that pre-trip online research is an established primary behaviour of tourists.

Also a majority of the interviewees (particularly those from the Generation Y group) indicated that they conducted online research whilst during their trips. This appears to contrast with the ATLAS survey of cultural tourists, which identified that whilst a large proportion of respondents used the Internet to plan their trips pre-arrival, only 13% used the Internet as a source of information during their trips. (Richards 2007). It is possible that this represents a change in online research behaviours over the 5 years between the ATLAS survey and the user interviews. In that time wireless connectivity and Internet enabled smart phone usage have increased significantly, as well as the increasing impact on tourism of the more 'digitally native' Generation Y group.

Further research could seek to verify this perceived change in behaviour as well as exploring on what devices online research during travel is commonly conducted.

6.2.2 Search engine driven research

Visiting 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).

The user interviews appeared to concur with these findings with the majority indicating that they were more likely to go to a search engine first rather than tried and trusted websites when conducting online research in connection to their trips.

This propensity for using search identifies the need for the Proposed Service to focus on maximising strategies for search engine optimisation (SEO). Further research could look into whether such 'search engine' driven online research behaviour translates into a growing 'explorative' process of online research amongst tourists (i.e. clicking on links to other websites and going deeper into pages) as opposed to more 'navigational' processes of staying within particular pages of familiar websites.

6.2.3 Going mobile

Usage by tourists of mobile phones to connect to the 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 appears impacted when on holiday overseas. Of European tourists who own smartphones, a higher proportion use them less often when they go on holiday than the rest of the year (IPSOS 2011). The IPSOS study referred to expensive roaming charges as well as a possible desire to "disconnect" as possible reasons for this.

The user interviews in contrast indicated that a larger proportion of those who owned smartphones would use them at least as often to connect online whilst on holidays overseas, compared to other times. It is possible that this could be attributed to a lower desire to 'switch off' when travelling for cultural reasons, although further research would need to confirm this. The possible cost of connection was highlighted as an obstacle however with many only using hotel or other wireless networks to connect. The cost of roaming charges was the main reason provided by interviewees for not connecting whilst 'on the go'.


© "Group of smartphones" by gillyberline/Wikimedia Commons /CC by 2.0)

Mobile phone web activity specifically relating to travel has increased year-on-year since the advent of smartphones. However in certain European markets in the last year this growth has stagnated or in some cases such as in Germany has shrunk. On face evidence this may indicate a possible reduction in popularity of using mobile for travel purposes, however studies identify this as a possible temporary blip caused by the shift of smartphone owners from early adopters who are eager to engage in a broad range of mobile activity, to a mainstream audience with less inclination to explore complex mobile functions (PhoCusWright 2012).

There is currently little evidence within the literature of the usage of apps (mobile phone applications) by tourists in connection to their travels in comparison to other sources of information. Where details are available they show that app use is currently low, for example 15% of UK travellers currently use apps to help plan their holidays (Bowker 2012). Of these app users the large majority identified that the most important feature looked for in a travel app was that it was free to download rather than containing any content specific features (Bowker 2012).

The literature suggests that the current impact of mobile on tourism is hard to assess, particularly as the shift of smartphone users from 'early adopters' to 'mainstream users' is still taking place and various difficulties are encountered when seeking to connect online whilst overseas. However such uncertainty appears temporary. Smartphone usage is massively on the rise with forecasts indicating 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 (Walsh 2010). Also the arrival of 4G networks to Europe, as well as recent price caps put on data roaming charges within the EU, are likely to remove the existing barriers to mobile connectivity for the tourist.

Whilst the pace of change means that is impossible to provide an accurate current picture of the impact of mobile on tourist information behaviours, it seems beyond doubt that the role of mobile on tourism will only increase. Whilst further research will be essential to understand the nature of the changing impact, **it is clear that the Proposed Service must explore opportunities that embrace mobile as part of its solution.**

6.2.4 A desire to share

The literature demonstrates that tourists are increasingly inclined to not only gather information in connection to their trips, but also to share it. This represents the primary usage of social media in connection to travel. For example the large majority of French, German and UK active social media users were interested in sharing updates/pictures/videos about travel experiences (PhoCusWright 2011a), whilst it was identified that the two leading uses of social media for UK tourists were sharing photographs and keeping in touch (Bowker 2012:79).

The user interviews confirmed these findings, with a large proportion of interviewees tending to use social media to share information in connection to their travels via status updates and uploading photographs. Aside from social media, there was a lower willingness to share information in other ways such as providing reviews of places visited, blogging or updating Wikipedia. Interviewees generally were more inclined to want to share information after their trips rather than during them, although given the potential impact of increased mobile usage for travel described above, this could change in the future.

6.2.5 Seeking verbal recommendations

Currently the most popular behaviour when gathering information connected to travel is to seek out recommendations of friends, colleagues or relatives. For example a global benchmarking survey of 15,000 international tourists from 30 markets, found that 40% of international visitors chose their destination based on friends & relatives' recommendations in 2011 (Travelsat 2011). Also a majority of survey respondents within the EU said that the recommendations of friends, colleagues or relatives were most important to them when making travel decisions (European Commission 2012:17), whilst the ATLAS Cultural Tourism Survey highlighted that discussions with family and friends was the source of information most frequently used prior to departure (Richards 2007).

Sourcing these recommendations appears to take place verbally rather than via social media networks. 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), whilst in the UK less than 1% of tourists use social media when seeking inspiration for their holiday destination (ETC 2012).


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The user interviews identified a similar need within tourists to seek out verbal recommendations, with many interviewees indicating that 'word of mouth' was a vital source of information both before and during their trips.

Going forward it would be interesting to understand if this perceived reliance on verbal recommendations translates itself digitally into greater usage of social media networks as an alternative source of travel recommendations. Indeed TripAdvisor's recent content partnerships with Facebook, to prioritise users' friend's reviews (detailed in the next chapter), is a step towards this. Analysing this possible changing behaviour could be the subject of further research.

6.2.6 Continued reliance on traditional media (including print)

Whilst increased digital usage is generally thought to impact negatively on the role of traditional media, the latter still appears to carry an important level of influence when gathering travel information. For example 25% of EU Tourists indicated that conventional media sources were a primary information source when making decisions about travel plans (European Commission 2012:17), whilst in the UK a recent study found that 13% of respondents still opted for traditional media sources when asked to select their one major influencer when selecting their holiday (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). Also from a cultural tourist 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).

The user interviews also revealed the popularity of guidebooks both before and during trips, whilst other print material such as brochures, leaflets and maps were also commonly used. This traditional media usage was however largely driven by interviewees within the over 55 age category, whilst those within the Generation Y group were much more focused on 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 guidebooks could be more relevant for cultural tourists in particular, although further research could seek to validate this. However, given the perceived 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.

6.2.7 Not just about pre-trip planning

Whilst the majority of interviewees were generally more active in respect of engaging with information before their trips than during or after them, this could be changing. The potential impact of increased mobile usage in connection to travel, and the desire to share information as well as gather it, could mean that the ‘during-trip’ and ‘post-trip’ phases become more relevant to tourists in the future. It is interesting to note that generally interviewees from the over 55 age group were much more focused on the pre-trip phase, rather than those from the Generation Y age group. This could indicate a possible ‘levelling out’ across information stages as digital usage increases and younger more ‘digitally native’ tourists develop.

The interviews also revealed a growing desire to not ‘over-plan’ and just discover things on arrival or simply be inspired. Examples of comments include:

“I like finding stuff out and not over-planning.”

“I prefer not to plan too much and like to explore and discover while I’m travelling.”

“I don’t feel the need to consult lots of sources of information, I often just want to turn up and see what happens”

These observations indicate the importance of not only viewing the information behaviours of tourists as taking place in connection to pre-trip planning, but also to allow for behaviours that focus on a desire for serendipity, inspiration and sharing.

6.3 What types of information do cultural tourists look for?

6.3.1 The ‘information type’ 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
- Feel frustrated by the difficulty of navigating that information (Travelport 2011).

The user interviews generally concurred with these findings. There were a number of comments that indicated that whilst cultural venue and event information was abundant online, it was:

- Far too dispersed over numerous websites
- 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."

6.3.2 The 'website type' requirements
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 such as Expedia, Priceline (which includes Booking.com) and TUI featuring highly for tourists in Europe (ETC 2012).

The literature also points to the increasing importance of traveller review websites. For example a study of French, German and British tourists demonstrated that they 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). Other types of sites that remain popular include "destination websites", such as those of public tourist bodies, for example a recent study identified that 40% of leisure travellers still consulted these when planning their trips (Travelport 2011).

The user interviews concurred with the popularity of peer review sites such as TripAdvisor, while national or local tourist office websites also proved popular, particularly with interviewees aged over 55. Of relevance from a cultural tourist perspective was the prevalence of cultural venue or events websites amongst interviewees when planning their trips. 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 appear to extend to their tourism needs also.

Other popular types of websites mentioned by interviewees include cultural venue and events listings websites, niche art form websites (e.g. film/dance festival/music/architecture websites), specific online forums, couch-surfing websites and lifestyle magazine websites. When asked about blogs, very few interviewees claimed to use these as a source of information, whilst Wikitravel was not used by any of the interviewees, although some referred to Wikipedia as a useful source of information on heritage sites.

6.3.3 The 'digitised collections' type requirements
Interviewees were asked about their respective awareness and usage of digitised collections information. Whilst there was a relatively high awareness of digitised collections information, only a minority of those who were aware of them had accessed or viewed them.

"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?"

7 Existing Supply Analysis

Chapter summary.

The existing supply analysis focuses on the current 'information supply' and the 'strategic supply' impacting on cultural tourists.

The information supply analysis seeks to identify the relevant current trends impacting on tourism publishers, as identified within the literature. The impact of these trends is then explored in the context of particular case studies reflecting 'new' commercial tourism publishers (TripAdvisor), 'traditional' commercial tourism publishers (Lonely Planet and Rough Guides) and public tourist body publishers (various bodies from the UK and Greater Region). The analysis concludes by identifying a range of resulting challenges and opportunities for the Proposed Service.

The strategic supply analysis examines the existing strategic approaches to cultural tourism by a range of national, regional and local public tourist bodies within the UK and the Greater Region. It identifies particular trends within these approaches representing potential challenges for the Proposed Service. The analysis concludes by putting forward a suggested strategic opportunity for developing future relationships with public tourist bodies in connection to cultural tourism.

7.1 Introduction

7.1.1 The 'information supply' and the 'strategic supply'

The existing supply analysis explores the current information supply to cultural tourists and the current strategic supply drivers of cultural tourism. This analysis aims to identify any relevant learning or partnership opportunities and challenges for the Proposed Service.

The information supply focuses on trends and issues impacting on existing publishers of content to cultural tourists. Publishers in this case are commercial tourist publishers and public tourist body publishers. The key questions for analysis are:

- What are the current market trends impacting on tourism publishing?

- How are existing publishers addressing these trends?

The strategic supply focuses also on public tourist bodies, but in this case specifically on their role as strategic drivers of cultural tourism for destinations. The primary question for analysis is:

- How do public tourist bodies currently articulate their cultural tourism strategies?

This analysis relies partly on literature review and partly on case studies. The literature explores the broader contextual landscape, whereas the case studies examine the practical responses.

7.1.2 Case studies

The case studies chosen to represent commercial tourism publishers are taken from both the 'new' form of digital publishers (TripAdvisor) and the 'traditional' form of guidebook publishers (Lonely Planet and Rough Guides).

All three chosen publishers appear relevant for cultural tourists and thus relevant for the Proposed Service. A recent study identified Rough Guides and Lonely Planet users as more likely to take cultural holidays than other traditional guidebook users. They were also specifically used to look up information for history/culture as well as things to do information (Bowker 2012). TripAdvisor's position as the most popular travel website in the world means that its users must comprise cultural tourists amongst others and so cannot be ignored.

The case studies chosen to represent the public tourism body publishers are based on Culture24 and Plurio.net's geographical links and networks, focusing on the UK and Greater Region and where possible chosen at a national, regional and local level. These are:

- UK
    - VisitBritain
    - VisitEngland
    - VisitBrighton

- Greater Region
    - Marketing Touristique pour la Grande Region
        - This represents a cross border public tourism strategy for the whole Greater Region
    - Direction de la Stratégie Touristique de Wallonia
    - Comite Regional du Tourisme de Lorraine

The UK case studies are primarily relied on during the information supply analysis due to greater ease of review in this area, whilst all public tourist body case studies are explored within the strategic supply analysis.

7.2 Information supply

7.2.1 Travel publishing trends

7.2.1.1 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, watching, sharing and buying all now 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.

7.2.1.2 The advent of SoLoMo

In travel marketing and publishing terms, several commentators are referring to 2012 as the year when SoLoMo took off. This refers to the convergence of technologies focusing on the social, local and mobile; combined with a growing user need to always be connected, share experiences and gather information from the local environment. SoLoMo is commonly manifested in the development of mobile phone apps that combine social networking and location data (e.g. Foursquare).

7.2.1.3 Content is king again

There is strong recognition within the publishing market that content (as in engaging, 'sticky', rich and shareable information), is fast supporting the publisher's brand as a way of reaching out to customers. Even retail-centric brands such as 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 apparent conclusion of the print v digital debate has signalled a consensus of focus "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).

Also recent Google search algorithmic changes now favour more content-rich publishers (particularly those presenting relevant niche information), so-called 'white hat SEO', over those that attempt to exploit paid links and fool the algorithms, 'black hat SEO'. Therefore increasing relevant online content has become a valuable way for brands to improve their 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 represents 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).

7.2.1.4 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 for publishers. UGC in the tourism sector is commonly seen in user generated reviews of hotels, restaurants and other facilities as well as the in the proliferation of travel blogs.

This form of content not only presents an opportunity for users to self-publish or engage in conversations, 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 high online profile of travel blogs responds to the growing interest in local information when travelling, as well as the rising favour of niche content with audiences within search algorithms. As a result certain blog writers have been recruited by large publishing companies to generate local niche content in their name. This has also resulted in 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. see 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)

7.2.1.5 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" (from 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).

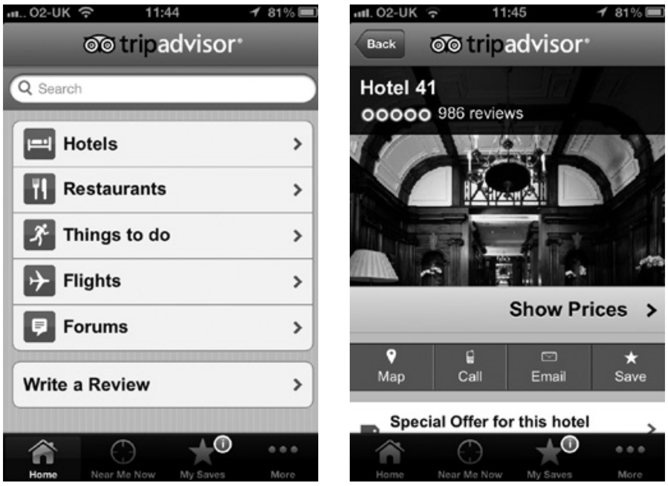
7.2.2 "New" Commercial Publishers: TripAdvisor Case Study

7.2.2.1 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, attractions 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 Facebook connected users (Dailymail.co.uk 2012).

"There is strong recognition within the publishing market that content (as in engaging, 'sticky', rich and shareable information), is fast supporting the publisher's brand as a way of reaching out to customers."

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. For example:

• 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).

• 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).

7.2.2.2 Content

UGC
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. In fact 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 publishes content about various cultural venues such as museums, galleries and heritage sites within the 'Attractions' section of 'Things to Do' in any particular location. Despite not being a familiar TripAdvisor content type (compared with hotels or restaurants), the 'Attractions' section still remains popular with users as it is estimated that of its 70 million unique visitors, approximately 12% explore this part of the website (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 videos

Cultural events content (and collections content)
There are currently no events listings related to these venues but an interest was shown when discussed as part of this study. The initial response to the proposal of surfacing digitised collections content for TripAdvisor was that this "might only be for the purists" who were not regarded as 'typical' TripAdvisor users. However there was an interest in the possibility of surfacing a package of data that connected up certain collections information with events listings and related editorial content (Copus 2012). This should be explored further by the Proposed Service.

7.2.2.3 Whole journey engagement
A recent study identified that the TripAdvisor website and apps are used by far more tourists in connection with their pre-journey planning activities compared to other travel websites and apps, but were surprisingly less used than other travel websites 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.

7.2.3 'Traditional' commercial publishers: Lonely Planet & Rough Guides

7.2.3.1 Shift to digital and SoLoMo
What does the 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 the discussion earlier identified that printed guidebooks still remain popular with cultural tourists, so there is still 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 in 2007 when it 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 appearing every 12 seconds (Lonely Planet 2011:3).

Lonely Planet also has over 150 apps on a variety of publishing platforms that 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 Guides 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. In comparison to Lonely Planet's over 150 apps including 70 city guide apps, Rough Guides has around 15 apps including only 8 city guides. However, news upon completion of 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 (similar to the TripAdvisor/Facebook link-up) sources recommendations 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.

7.2.3.2 Content/UGC

Editorial content

In contrast to TripAdvisor, Lonely Planet and Rough Guides' primary content asset 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 that contained in print guidebooks in an effort to preserve their paid income model.

The fundamental question for these publishers to tackle is whether the rise of online user generated content, in the form of reviews and blogs, devalues their own 'expert' editorial content? 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 for these traditional publishers to reaffirm their '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 '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 being known for 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 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 and so present possible partnership opportunities for the Proposed Service.

7.2.4 Public tourist body publishers

7.2.4 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 websites staying consistent to the themes of information provision.

In a requirements-gathering exercise for a new internationally focused website, VisitEngland identified that public tourist body 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. (VisitEngland 2009). A recent study of 120 English public tourist body websites identified the primary purposes behind the provision of information by such websites could be grouped into four areas:

c"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 by Travelport found that public tourist body websites still remain popular, with 40% of leisure travellers consulting them when researching their last trip. It also proposed that the clarity of purpose of such websites (i.e. information provision) enabled them to compete well with commercial publisher websites. They could better met the needs of tourists who are "looking for a mix of inspiration about what they may do alongside practical information", as opposed to commercial websites that needed to capture and retain customers (Travelport 2011: 9).

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

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 public tourist body websites continue to remain 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, these websites appear to lag behind.

A major academic study (by eTourismLab at Bournemouth University in the UK and the Australian Tourism Data Warehouse) of the online presence of 30 public tourist bodies across the world, found that they only use a fraction of the available technology tools for promoting destinations online and the vast majority do not exploit all technological capabilities. (May 2012b). Of the case studies explored by this current research, only those in the UK (VisitBritain, VisitEngland and VisitBrighton) had developed an app and none had as yet sought to develop apps or activities with partners based on the SoLoMo concept.

7.2.4.2 Content

Editorial content
Editorial content (primarily text and images) is a key source of information on public tourist body websites and aims to reflect the expert voice that many such bodies seek to project to their audiences. This emphasis on expert editorial is similar to that identified for traditional commercial publishers and many of the issues discussed in context to those also apply here.

This editorial content is usually aligned with impactful design, incorporating lots of stylised images, colour and visual prompts such as top ten lists.

Image related content
As discussed above, stylised images used as part of editorialised content are prominent on many public tourist body websites, largely as a way of promoting brand. VisitBrighton noted the somewhat unrealistic prevalence of images focusing on blue sky and sun across their website related to the promotion of the accepted Brighton brand (Carmichael 2012). Research by VisitEngland referred to "picture power" and concluded "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).

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User generated content
Whilst some public tourist body websites (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 generally appear on public tourist body websites. 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 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 VisitBritain and VisitEngland 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 VisitEngland 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 public tourist body websites have still not been able to embrace it. Perhaps it is viewed as compromising the authoritative voice that the public tourist body seeks to convey. In fact when gathering requirements in connection to its international site, VisitEngland identified that user generated content had to be carefully managed to avoid damaging trust (VisitEngland 2009). It is interesting to note that both VisitEngland and VisitBritain 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 public tourist body websites contain listings of venue and events. The Inversini study of English public tourist body websites found that 93.3% feature cultural events and lists of events venues (Inversini et al 2011). The likely reason for the high percentage in the UK is that most local public tourist bodies have partnership arrangements with their local venues to promote them in this way.

Print related content
Despite the shift to more online forms of publishing many public tourist bodies still focus their content production on printed output, which may often be downloaded online. A large amount of the content produced by Marketing Touristique pour la Grande Region for example is in the form of extensive glossy brochures or guides, which are also available as PDF downloads. VisitEngland 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 Inversini study found that the large majority of English public tourist body websites (approx 70%) still had access to print downloads (Inversini et al 2011).

Other multimedia content (video/audio)
Generally the presence of multimedia content is low on public tourist body websites. The Inversini study found that videos were used online by 28.3% of respondent websites, podcasts were present in 15% and virtual tours appeared in 4.2% of cases (Inversini et al 2011). The requirements gathering for the VisitEngland site found that "more advanced web 2.0 content like videos, podcasts was seen as low priority" (VisitEngland 2009).

7.2.4.2 Whole journey engagement
Given their emphasis on information provision and their primary focus on websites rather than other digital tools, public tourist bodies are largely set up to engage the tourist before their visit. The eToursimLab and Australian Tourism Data Warehouse study of 30 public tourist bodies across the world identified that the majority concentrate only on providing information for the "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 public tourist bodies are aware of this and are increasingly seeking to engage the user across all the stages. For example recent research commissioned by VisitEngland 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" were significant periods for sharing information (VisitEngland 2012d). The inspiration phase has been promoted actively by VisitEngland, particularly in its website design.

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

VisitBrighton's approach in linking up with the end user focused on four key stages, namely: inspire, inform, enable and engage. Again we see the relevance of the 'inspire' stage here. They indicated a desire to focus more on the 'engage' stage as it sought to target the user on an ongoing basis. The importance of driving a two-way conversation with users, by using social media rather than more formal channels, was highlighted as a priority for this. They felt that it was important to prompt some sort of opinion from someone via these channels, even if not positive, demonstrating a desire to focus on ongoing conversation rather than a more traditional model of one-way information supply (Carmichael 2012).

7.2.5 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

• 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 out 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 TripAdvisor's existing content with an editorial layer

• Public tourist body websites demonstrate how promoting a distinctive purpose, has enabled them to remain relevant amongst tourists. The Proposed Service should similarly seek to convey a distinctive function for tourists.

7.3 Strategic supply

In an analysis of how public tourist bodies (based on the case studies) currently articulate their cultural tourism strategies, the following inferences can be drawn.

7.3.1 A variety of approaches

The strategic approaches to cultural tourism varied across all case studies, probably reflecting their own strategic priorities and organisational challenges. These approaches can however be very loosely grouped within the following 3 categories:

• No specific, separate cultural tourism strategy

The Direction de la Stratégie Touristique de Wallonia demonstrated such an approach, indicating "until now cultural tourism just happens but there has never been a proper strategy for this". This was attributed to culture, tourism and heritage in Wallonia being responsibilities of separate departments, producing difficulties in articulating a cultural tourism strategy that could sit across all three (Duhaut 2012).

• No specific cultural tourism strategy as inherent in overall strategy

VisitEngland, VisitBrighton and the Comite Regional du Tourisme de Lorraine demonstrated elements of this approach. VisitEngland explained they currently had no cultural tourism strategy as the focus was not on niche cultural tourism interests, but rather "how to build a cultural offering into the wider strategic offering" which currently concentrates on growing tourism locally (Field and Lewis-Jones 2012).

The Comite Regional du Tourisme de Lorraine expressed surprise at being asked about cultural tourism strategies, as culture (primarily in the form of cultural heritage) was regarded as an inherent component within the Lorraine tourism offering (Boendermaker 2012).

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

• A specific cultural tourism strategy driven by brand

This approach was demonstrated by VisitBritain and Marketing Touristique pour la Grande Region. VisitBritain 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 and emphasis what are termed the 'three pillars' of culture, namely cultural heritage, built heritage and contemporary culture (VisitBritain 2010).

Marketing Touristique pour la Grande Region specifically defines cultural tourism as a key part of its strategic marketing approach. Such a strategy seeks to market the Greater Region from a cultural tourism perspective, primarily through the promotion of themes such as gastronomy, wine and cultural heritage (Peters 2012).

No value judgements comparing these respective approaches can be made, partly due to a lack of definitive evaluation studies. However what can be inferred in the variety of approaches seen, is that cultural tourism as a strategic concept is difficult to pin down. Therefore rather than seeking to learn from existing public tourist body strategies, the Proposed Service should rather have clarity about its own cultural tourism strategy and then explore partnerships with public tourist bodies that align with this.

7.3.2 Lack of collaboration between respective partners

This issue was primarily raised by Marketing Touristique pour la Grande Region which, despite the establishment of a cross-border cultural tourism project, still faced reluctance amongst partner regions to cooperate with each other for the advancement of the project (Peters 2012). Evidence of this

The advent of SoLoMo demonstrates how quickly change is taking place in publishing platforms, the challenge is to keep up with these developments was also seen in discussions with the Direction de la Stratégie Touristique de Wallonia 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).

If a sense of competition rather than collaboration between respective public tourist bodies exists, any possible collaboration with the Proposed Service especially on a Europe-wide basis could be equally challenging.

7.3.3 Minimal input by cultural venues towards cultural tourism strategies

There was little evidence within any of the case studies of engaging cultural venues such as museums when articulating 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 VisitBritain cultural tourism strategy, which was articulated a few months after the publication of the MLA report, did incorporate museums, arts etc into their 'three pillars' approach. However, beyond a recognition of the importance of such venues to the UK's cultural identity and a focus on promoting the brands of certain major venues, there appears to be little consideration of how these venues may specifically contribute toward the advancement of this strategy (VisitBritain 2010).

The report also indicated that responsibility for the lack of a relationship was borne from both perspectives, highlighting 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, conducted as part of this current research, 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 equally stay within the scope of their existing identities and aim to make their own content and information (e.g. collections and events) more easily available to tourists?

7.3.4 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 Marketing Touristique pour la Grande Region 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. Marketing Touristique pour la Grande Region indicated that the presentation of generic themes was borne out of the partner regions' reluctance to collaborate, leading to the lowest common ground of agreement. (Peters 2012)

The VisitBritain cultural brand, whilst not just referring to culture as the mass market activity referred to earlier 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 cultural assets like local museums, collections content, gallery events and the like.

7.3.5 Conclusions

The analysis detailed above points to the challenges the Proposed Service will face when seeking to collaborate with public tourist bodies on a Europe-wide strategic level to reach cultural tourists. These include:

• A lack of consistency in strategic approaches

• An often non-collaborative mind set

• A perceived inability to work on a strategic level with cultural venues.

However at the same time there are certain opportunities.

There appears to be disconnection between the role of a public tourist body as a strategic driver of cultural tourism and its role as a publisher of content. It has been seen earlier how many brands are now becoming content publishers to advance their own strategic goals. Yet this does not appear to be happening with public tourist bodies. 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 also be driven by content as well as by brand?

Given the cultural content focus of the Proposed Service, if it can articulate this need effectively to public tourist bodies, it could also present itself as part of the solution. Such a solution would promote more content-focused cultural tourism strategies for public tourist bodies 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.

8 Proposed Supply

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Chapter summary.

The proposed supply analysis touches upon the existing and potential requirements of two key stakeholders within the Proposed Service, namely cultural events/venue data aggregators/publishers AND collection holders.

'Core' and 'nice to have' requirements are then defined for the former stakeholder in the context of both venue/listings data sources AND digital collections data sources, before briefly touching upon the key considerations for collection holders in the planning and delivery of the Proposed Service.

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8.1 Cultural events/venue data aggregators and publishers

8.1.1 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. 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'.

It is relevant to note that these assertions are based upon Culture24's and Plurio.net's extensive experience of operating cultural venue and events aggregation services that work across subject domains, at local, regional and national level and for multiple venue types and strands of culture. These organisations also publish their information on a range of websites and have over the last ten years done so in partnership with a range of commercial and non-profit partners for many different target audiences.

8.1.1.1 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 – i.e. 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.

8.1.1.2 Nice to have/supplementary requirements

These are the 'extras' – information and content elements that help publishers and aggregators add audience appeal and build services. Although they are 'nice to have', they make the difference between basic information and 'sticky usable' information. They include:

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

• 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

8.1.2 Requirements: digital collections data sources

'Digital collections data' in this context refers to data sourced from Europeana. It is important to note that **Europeana aggregates collections metadata** from institutions across Europe (referred to as 'Europeana data'), rather than the digitised collection object files themselves (images/multimedia files). The Proposed Service seeks to 'package' Europeana data with digital venue and events data but will also have to explore the issues around seeking collection object files for publication from certain collection holders, if required.

The term 'package' refers to the process of supporting or supplementing venue and events data with related Europeana data and, potentially, collections content. The relationship could be direct or indirect. Connections between the data sets might be made through geography, subject matter, promotional theme or simply as an editorialised choice.

Examples of directly related content association might be items held by or displayed within a venue. For e.g. 'Here's a taster of what you'll see when you visit Museum X'. Examples of a more indirect association might be items that relate to a generic theme or to a specific place indirectly. For e.g. 'Looking for a garden to visit? You might like these beautiful botanical illustrations…' or 'Visiting sunny Barcelona? Check out these sunny Spanish landscape paintings to get yourself in holiday mood'.

This task of packaging cultural venue and events information with Europeana 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 data 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 originate and the needs of the end users who will be viewing the objects via a digital service.

It should be noted that, as opposed to the venue and events data requirements listed earlier, these requirements around packaging with Europeana data are informed assumptions at this stage. They are 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. It is recommended that close examination of the results of this piloting work be the subject of further research.

8.1.2.1 Core/essential requirements

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:

• Information about the collection/organisation the item is from (to associate it with its venue)

• Name or title of the item (to present as part of a caption)

• 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

8.1.2.2 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'

8.2 Collections holders

Brief mention must be made here of 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 main supplier of data 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:

• The need to honour the rights requirements of all collection items. Even if offered openly as 'shareable' content there will 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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