



# HTHIC

Heritage, Tourism and Hospitality  
International Conference 2017

Conference Proceedings



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**In Memoriam**  
**Professor Frank M. Go**

**22.8.1948 – 7.5.2017**

We all felt a deep sorrow when Professor Frank Go was no longer among us at the HTHIC2017 conference. As the conference organizers I and my colleagues are grateful for his trusting friendship and his decision to let us arrange the third HTHIC conference in Pori in 2017. The founding father of the idea of HTHIC conferences, Frank had a phenomenal ability to gather a community around him consisting of people who shared his philosophical and research-focused interests. For many of us he was an honored and beloved tutor and mentor. During our long term scientific authorship cooperation Frank visited Finland and Pori many times. I invited Frank to be a keynote speaker at several seminars and conferences arranged in Finland and many of my colleagues and partners in the field of cultural heritage and tourism got to know him. During these visits Frank got acquainted not only with the conference venue in Pori and its history as a cotton factory, but also with the unique and beautiful ironworks areas and the sites designed by the world famous Finnish architect Alvar Aalto. On one of his visits, our research team visited also the Noormarkku area, just as we did during the conference, and witnessed Villa Mairea's significance as a true relic of the cultural and industrial heritage in the region. It was a great pleasure that Frank's wife Quita and his sister Frances could honor the conference with their presence.

Arja Lemmetyinen



# Foreword

## Heritage, Tourism and Hospitality

### International Conference HTHIC 2017

#### September 27-29, 2017 in Pori, Finland

After the great successes in Istanbul 2014 and Amsterdam 2015 we were delighted to arrange the 3<sup>rd</sup> HTHIC conference in Pori in 2017. The year is especially significant as it coincides with Finland celebrating the 100<sup>th</sup> anniversary of its independence. This makes it even more significant to study and debate preserving and promoting the coastal and industrial heritage in Finland.

We sought to focus the HTHIC2017 conference with the leading question “How can tourism destinations succeed in attracting tourists while simultaneously engaging all stakeholders in contributing to the preservation of the natural and cultural heritage?” In this world in transition, characterized by globalization, continuous growth in tourism, migration and mobility based on migrant citizenship, there is a need for researchers and practitioners alike to explore the possibility of reframing tourism beyond “the tourist gaze” and studying the interaction, dialogues, and conflicts that arise between visitors, hosts and cultural institutions in the representation and re-use of the past for tourist purposes. These are leading themes in many of the papers presented in the tracks on the topics *Natural Heritage and Tourism Development*, *Public Policy and Stakeholder Engagement* and *Gamification, Audience and Stakeholder Engagement*. These themes were also apparent in the papers presented in the session dedicated to *Festivals and Events*. We also welcomed contributions that advance our understanding of the role of storytelling and narrative techniques, since destinations (places, regions, and routes) and tourism dynamics need people to tell and share stories to co-create heritage values, embed them in a sustainable spectrum of tourist facilities, and induce valuable tourist experience. These contributions were to be seen for example in the papers presented in the tracks with the topics of *Tracing, Narrating and Developing Routes* as well as *Architecture, Heritage and Narratives*. Storytelling plays a role as a tool for branding, marketing, ensuring stakeholder and visitor engagement, and promoting sustainable management and innovation strategy, as is illustrated in the papers presented in the track titled *Latest from Lapland* as well as *Current Research and Education at the University of Turku*.

Knowledge of critical success factors, and skills in narrative management are necessary if storytelling is to contribute to the development and promotion of innovative heritage-based tourism value propositions and products. These were themes in many of the papers presented in the tracks of *Creative Industries and Tourism Development*, *Sustainability and Inclusiveness*, as well as *Heritage, Tourism and New Media*, and moreover, the papers in the track for *Museums Off- and Online* represented this particular theme. 2017 has been designated by the United Nations 70th General Assembly as the International Year of Sustainable Tourism for Development. Consequently, HTHIC2017 stresses the close connections between the topics covered, sustainability in its many aspects, and development. This emphasis can be seen in the papers presented in the tracks with the topics, *Sustainable Tourism Development* and *Heritage and Sustainable Tourism Development*. In addition, several papers are presented in the track on *Heritage, Tourism and Water*.

Three papers were nominated for the *Best Paper* award. The winner was Emanuela Conti et al. with the paper titled “*Museum visitors’ profiling in the experiential perspective, value co-creation and implications for museums and destinations: an exploratory study from Italy.*” The paper analyses the changing competitive position of museums today and promotes the need to re-segment the audience and re-promote the offerings. The second prize was given to Sanghamitra Basu’s paper titled “*Mapping and narrating heritage: retracing a forgotten route to link multilayered history of a region and use of an indigenous storytelling technique for presentation.*” The author provides a lively description of how cultural heritage may be conserved and communicated in a sustainable and co-creative manner. The third prize was given to Silvia De Ascaniis et al. for the paper titled “*A social media campaign to raise awareness about violent heritage*”

*destruction. The case of #faces4heritage.*” The paper offers a compelling discussion of a campaign addressing the worldwide and serious problem of heritage destruction. The awards were given to the winners at the celebratory dinner at the Noormarkku Club by Ms. Frasquita Go and conference chair Arja Lemmetyinen. **Congratulations to the winners and thank you to all the authors for your invaluable contribution to the HTHIC2017 conference and the proceedings.**

We would like to express our gratitude to the members of the organizing committee, and particularly HTHIC co-founder and managing director and HTHIC2017 Chair Karin Elgin Nijhuis who, in collaboration with the Destination and Industry Committee, has succeeded in safeguarding that the conference is a practitioner-friendly event, in which scientific evidence is interacted with best practices and experiences from around the world. We also thank the Scientific Conference Committee and the reviewers, who have worked to ensure the quality of the submitted papers. Additionally we would like to acknowledge the support of our sponsors and partners in ensuring the success of the conference.

We hope that you will enjoy this collection of high quality papers, research notes and abstracts from a cast of international researchers in the fascinating field of heritage, tourism and hospitality.

Arja Lemmetyinen  
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# **Heritage, Tourism and Hospitality International Conference HTHIC 2017 September 27-29, 2017 in Pori, Finland**

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# Antecedents and Consequences of Destination Brand Love – Case Ylläs

Kaisa Aro, Kati Suomi and Salla Saraniemi

Research Note

**Keywords:** brand love; destination brand love; place bonding; emotional branding; tourist destination.

## Introduction

A considerable proportion of consumers love things other than people, including brands (Batra, Ahuvia, & Bagozzi, 2012). Brand love is a relatively new concept in academic discussion, and demonstrates the changed relationships between consumers and brands. The area is relevant for study, given the tightening competition in the tourism sector for visitors, funding, and support from different stakeholder groups.

Studies focusing on the relationships between people and places/destinations as brands, are scarce, particularly studies examining consumers' love for place/destination brands. However, there are two studies focusing on brand love in the context of destination brands: Swanson (2015, 2017) and Lee and Hyun (2016). Thus, understanding on the concept is still limited, in terms of its construct, antecedents, and consequences. Given the current weaknesses in existing knowledge on destination brand love, *the purpose of this study is to conceptualize the antecedents and consequences of destination brand love.*

## Theoretical Background

### Brand Love

Brands have long been studied through measuring customer satisfaction (e.g., Fournier & Mick, 1999), and brand loyalty (e.g., Oliver, 1999). Brand love has been noted to enhance loyalty (e.g., Carroll & Ahuvia, 2006). In the context of brands, Baldinger and Rubinson (1996) suggest a definition of loyalty that includes both attitudinal and behavioral aspects, as loyalty should not be considered merely a repeat-buying pattern, but also a strong attitude toward the brand. Carroll and Ahuvia (2006) refer to brand love as: "the degree of passionate emotional attachment a satisfied consumer has for a particular trade name" (p. 81). The definition is adopted in the present study. Figure 1 summarizes, on the basis of our literature review, the antecedents of brand love, discussed in prior studies on mainly physical brands.

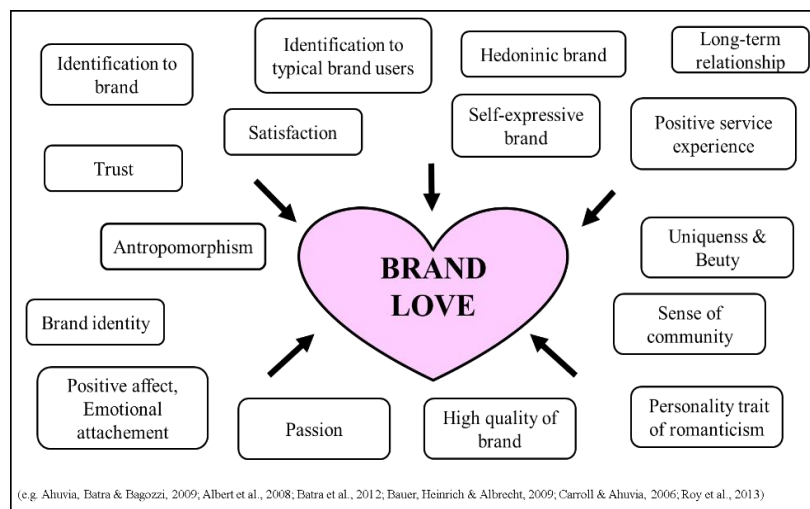


Figure 1. Antecedents of brand love

Figure 2 presents the suggested consequences of brand love detected from prior literature in the context of physical brands.

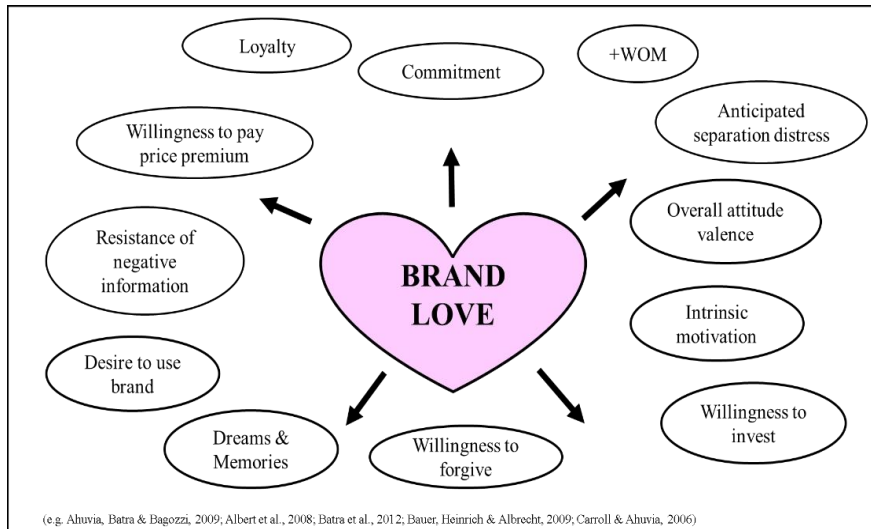


Figure 2. Consequences of brand love

### Emotional Bonding with Destination Brands

Next we continue the discussion of brand love in the context of destinations. Place brands are a result of the interaction between a place’s internal identity and its external image (cf. Hanna & Rowley, 2011). The tourism literature offers two ruling aspects of emotional people–place relationships: place bonding and place attachment. These two concepts are partly overlapping, and in some studies they are treated synonymously (Cheng & Kuo, 2015; Hammitt et al., 2009). The concept of brand love has not yet established its place in studies of people–place relationships. However, two recent studies (Lee & Hyun, 2016; Swanson, 2015, 2017) indicate that brand love is a phenomenon worthy of research in the case of tourist destinations.

*Place bonding* is described as emotional attachment and the perception of an identity that one associates with a specific place. It is reported that tourists create emotional bonds while visiting places, calling for further research on tourist behavior (Gu & Ryan, 2008; Tsai, 2012). Further, *place attachment* is the most common concept describing the emotional bond in the academic literature on destinations. It can be regarded as the emotional and psychological bond between a consumer and a specific place (e.g., Hwang, Lee, & Chen, 2005; Prayag & Ryan, 2011; Tsai, 2012).

### Methodology

The research followed an abductive logic, in terms of constantly going back and forth between different research activities, and particularly empirical observations and theory (Dubois & Gadde, 2002, p. 556). The single-case design was deemed suitable, because the goal was to achieve an in-depth exploration of the antecedents and consequences of brand love (Creswell, 2003). The case in question is Ylläs, which is a tourist destination for active outdoor holidays throughout the year that is located in the middle of the wilderness in Finnish Lapland. Currently, international tourists are also increasingly visiting Ylläs.

The first author conducted semi-structured interviews between November and December 2016. The data gathering ended after 10 interviews. The interviews were recorded and transcribed afterward to improve reliability (Silverman, 2001).

## Results and Discussion

The purpose of this study was to conceptualize the antecedents and consequences of destination brand love. Figure 3 demonstrates our findings within the empirical grounded framework.

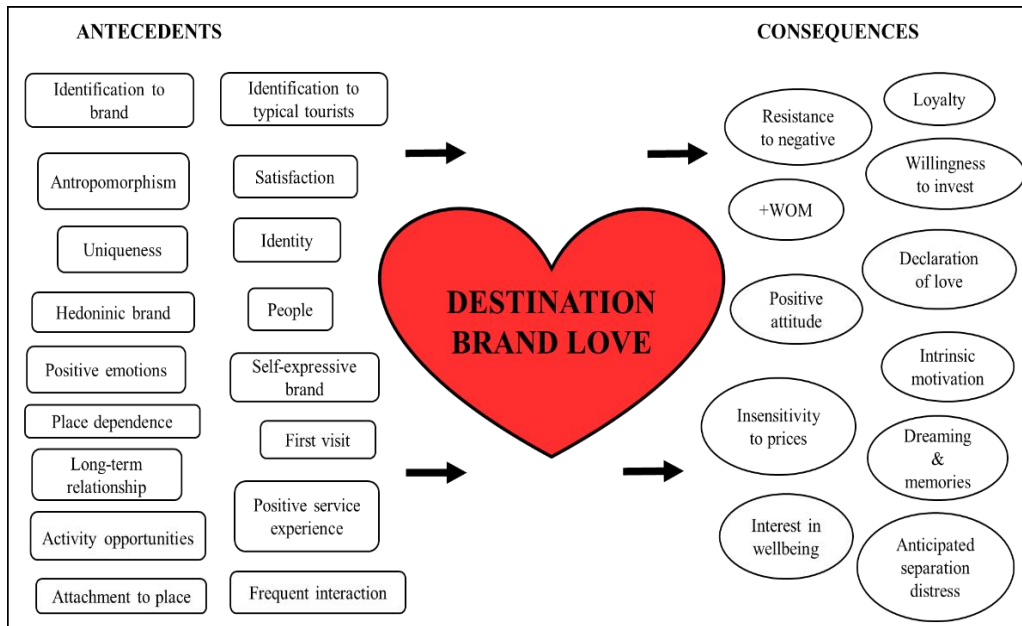


Figure 3. Empirically grounded framework of antecedents and consequences of destination brand love

The findings indicate that the concepts of place bonding and place attachment seem to be partly overlapping with the concept of destination brand love (Cheng & Kuo, 2015), in that they all deal with emotional bonds between people and place. We propose that destination brand love could be seen as an individual form of place bonding, as it concentrates on destination brands and is a very strong form of bonding, as its consequences indicate. We consider attachment to place as being an antecedent of destination brand love.

Further, in the case of destination brand love, some of the consequences are rather powerful, such as anticipated separation distress. This implies that destination brand love can be considered a stronger bond than place attachment. Interestingly, a consumer's interest in the wellbeing of the brand is presented in this study for the first time in relation to brand love. The cultural aspect is relevant as it appears that there are differences between countries in this respect. US-based studies have found that the love word is likely to be used in relation to objects and activities as frequently as to people (Ahuvia, 2005). The findings of this study are closer to the results of Albert, Merunka and Valette-Florence (2008), and Batra et al. (2012), which suggest that consumers prefer to use verbs other than *to love* when speaking about objects other than people. Nevertheless, in this study, although its subjects did not verbally express love for the destination brand, the way in which the person described his/her brand relationship revealed the same elements as are observed in studies of the brand relationships of people who verbally express brand love.

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# Mapping and Narrating Heritage: Retracing a Forgotten Route to Link Multilayered History of a Region and Use of an Indigenous Storytelling Technique for Presentation

*Sanghamitra Basu*

*Full Paper*

**Keywords:** historical route; heritage mapping; storytelling; indigenous art; community participation.

## **Abstract**

This article explores the possibility of using an indigenous form of narrative - a Storytelling technique through scroll paintings for presentation of numerous heritage resources of a particular region. It shows ways in which the use of a living intangible heritage - the *Pattachitra* can be integrated and improvised for Place Branding of a region. The key theme of this place making and narrative is a 'Route' that is mostly forgotten and lost its significance over time. Also highlighted is the crucial role of rivers as life line of the region and how this has changed with advent of modern transportation system. Retracing of ancient routes, it will be shown, can be done through overlaying maps from different ages and linking these with memories, forgotten names and descriptions.

## **Introduction**

In today's hyper-competitive and overtly homogenous marketplace, the strongest influence in persuading potential tourists to visit one destination opposed to another is whether they empathise with the place and identify with its values. It means promotion of heritage resources, both cultural and natural through enhanced recognition, and an understanding of and affection for the intrinsic values that are clearly place specific. As the need to portray a unique place specific identify becomes important, Place Branding with all its instruments of Place Making, Place Shaping, Destination Marketing and Heritage becomes critical and indispensable. But one must be cautious; success of any place branding is predominantly predicated upon local endorsement and support from local stakeholders. Moreover to maintain a balance between preservation of heritage, marketing and promotion, one needs an innovative approach and sensitive handling.

This paper discusses a part of an ongoing research project that explores ways to integrate preservation and promotion of tangible and intangible heritage resources of a region. For promotion of scattered, lesser known heritage resources, this particular paper proposes methods where indigenous art form can play a significant role. The process has two major components - 1) connecting the dots - the forgotten / lesser known scattered heritage sites, by retracing a historical Route and 2) presenting the narrative through *Pattachitra*, an ancient folk art of Bengal, where stories are told through songs by painters with the aid of unfurling painting scroll.

After a brief literature review, in Section One, to understand sustainable tourism and relevance of Route as a theme for tourism, the region and its major characteristics that shaped the region are briefly described in Section Two; and then through a timeline of the major events, the significance of the Route in question is highlighted (Section Three). The route is primarily traced through overlaying techniques, based on data and information from various documents and descriptions that are available. Significance of scattered places, sites and structures are assessed to identify potential footprints / markers of the historical Route. With examples of a few heritages sites selected from the ongoing research work, it is shown how a Route can be used as an anchor for a narrative script thereby creating a unique visitor experience. Section Four explains

this narrative process; how through a traditional form of storytelling as in *Pattachitra* - a unique experience may be created by the local artist communities. Various options exist for performance and presentation; 1) artists move from place to place (within and outside the country) narrating stories to various groups with the aid of the painting scrolls and specially composed songs, or alternatively 2) hosting visitors at designated heritage sites. The *chitrakars* or artists thus become ambassadors of this region and the unique experience helps in Branding the Place. The entire process also shows how an area's folk artists, when encouraged to participate and are given the opportunity, can contribute not only in actualizing the place branding process but also in development of sustainable and inclusive tourism.

## Literature Review

Several factors impact tourism that local authorities and any other decision-makers involved in the tourism industry must know when they make planning for tourism. Agenda 21 for the Travel & Tourism Industry: Towards Environmentally Sustainable Development (WTO, WTTC, Earth Council, 1995) outlines the policies and guidelines for sustainable tourism which means that the natural, historical and cultural resources of tourism must be preserved for their continuous utilisation in the present and the future. And local authorities along with organisers and service providers have an important role to play in order to meet the guidelines defined by the above document and the requirements of sustainability. On the other hand, there are a growing number of people who are more and more sensitive to environmental protection, and they wish to visit places that are carefully designed and where tourism means no environmental or social threat at all. With more opportunities and information available through internet and various forms of publicity, tourists are becoming more conscious and many of them seek new, less favoured and popular and accordingly less visited destinations, and new touristic experiences. Thus new trends should emerge for creating novel ways of attracting tourists which should be sustainable, sympathetic to local resources, inclusive and involve local authorities. And in selecting options between entertainment based tourism and sustainable tourism, goals must be clearly set out.

In this context, the phenomenon of 'route tourism' seems to be a desirable option for securing sustainability in travel and tourism (ECI Africa, 2006a). The term refers to an 'initiative to bring together a variety of activities and attractions under a unified theme and thus stimulate entrepreneurial opportunity through the development of ancillary products and services' (Greffe, 1994). A market-driven approach to tourism destination development, route tourism is referred to by a variety of terms, such as 'themed routes', 'trails' and 'scenic by-ways' and the concept of rural trails or heritage routes has been used in several parts of the world, particularly for promoting rural tourism (Telfer, 2001a,b; Meyer-Cech, 2003, 2005). Many tourism analysts consider this approach to be an effective method of tourism distribution (Meyer, 2004; Marlien, 2007), (ECI Africa, 2006a).

Gonda and Raffay (n.d.) in their article 'Theme routes in tourism- and spatial development' further elaborates on this concept of route tourism as a means of achieving sustainable development and promotion of local economy in rural hinterland. They have developed a framework to determine common traits of theme routes and have made a clear distinction between theme park and theme route: While theme parks are based on entertainment, aspects like desire of knowledge, discovery, learning play a dominant role in the case of theme route which is an effective means of enriching the supply of alternative tourism. Theme routes are built on elements that are available (or can be developed) in the given space, and use of cultural or natural endowments are more positively embedded in the local economy with more positive impacts on local society, economy and culture. Through well planned and well researched theme routes comprising chains of attractions, from sporadic, scattered interests, one can create attractions that are much stronger and competitive and at the same time rooted in the geographical space of operation. In their analysis of eighteen projects from various countries, Gonda and Raffay (n.d.), identified different approaches and innovative ideas for making rural areas more loveable and more successful. Simultaneously they could also identify quite a few common elements in the projects; preserved traditions, wide range of events and celebrations, development of local economy, with special focus on the promotion of the sales of the locally produced goods, job creation, the enlargement of local job opportunities and services emerged as basic elements in

almost all projects. These approaches of route tourism, sustainability and inclusiveness for promoting lesser known scattered heritage resources in the Study Area, primarily a rural hinterland, are explored in this article.

### The Study Area

The study area is a region located in the eastern part of India - East and West Medinipur Districts of West Bengal.

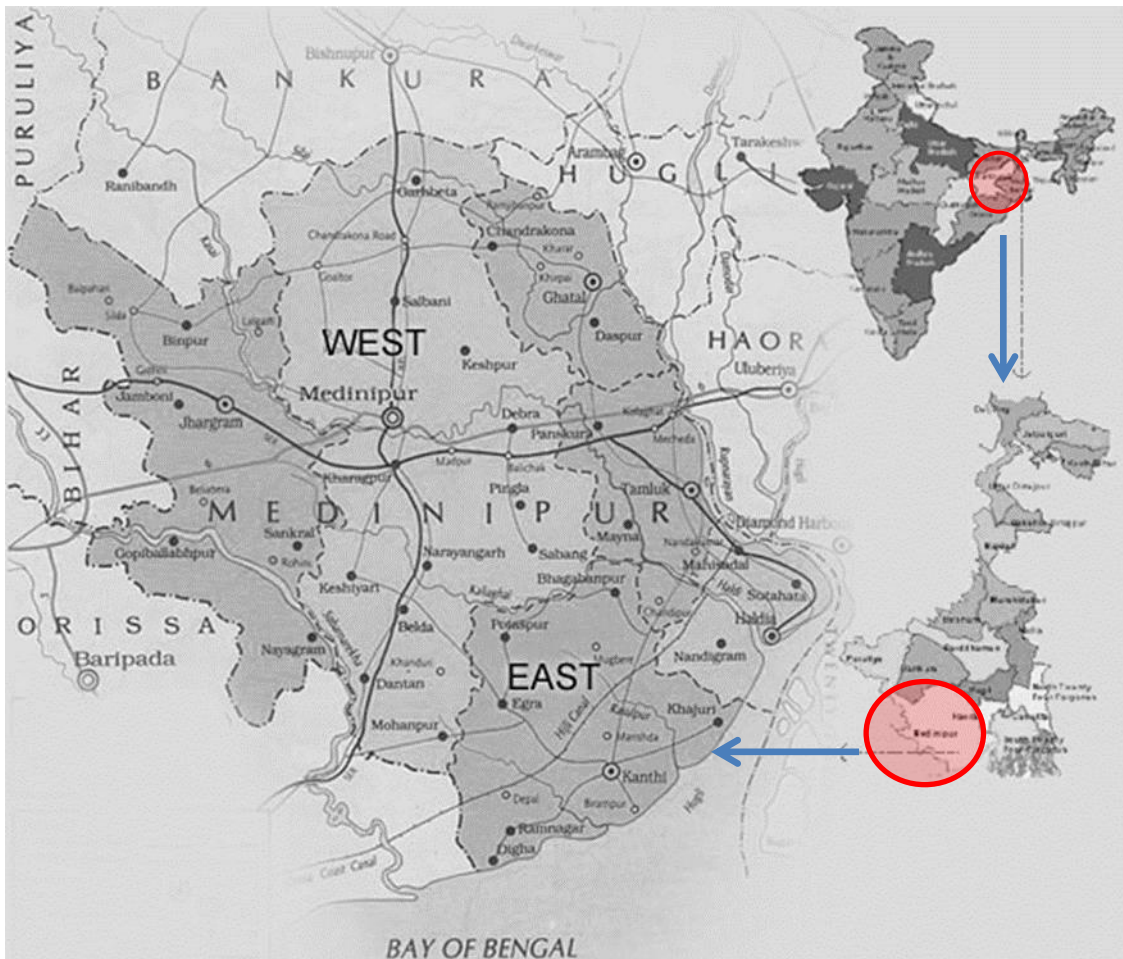


Figure 1. The Study Region (East and West Medinipur Districts) and its locations in India and the State of West Bengal. Courtesy: midnapore.in. Source: <http://www.midnapore.in/home-images/midnapore-district-map.jpg>

Due to its locational attributes, it became a frontier region in the historical time. Its eventful and turbulent history intertwined with its geographical profile and cultural history contributed to a multilayered and multidimensional character as reflected in the varied and rich archeological and historical heritage of the region. In the process of documenting heritage structures of this region (Basu, 2015) and understanding their heritage and cultural significance, a need was felt to contextualize the lesser known heritage structures/sites/artefacts with multilayered history of the place through ages, from prehistory to modern time.

The study area – Districts of Medinipur in West Bengal, a State in the eastern part of India, always served as a frontier region. Its vast coastal stretch along Bay of Bengal saw emergence of several maritime trade centres and number of navigational routes. A major historical route to the ancient port of Tamralipta, pilgrimage routes of Jain monks as well as road to Puri (a pilgrimage centre located in Orissa, on the coast) passed through this region. The route was and still continues to be the major connector from Eastern India to South,

through which traders, marauders, soldiers, pilgrims traversed over the ages. Repository of built heritage, spread all over this region is a testimony to this lineage. Historically the region in question was of a different configuration and had ever changing administrative boundaries over different time periods. One can easily see the continuity (and also variations) and distinct types of architectural development over centuries. Overlaying of the spatial pattern through ages, natural factors like coast line, rivers and waterways, provided a valuable framework and clues to link varied heritage resources. Ancient routes, now mostly defunct, were retraced. This emerged as the most important link and provided a platform to understand the significance of the heritage sites.

### The Region and its Major Characteristics

Natural boundaries in the form of rivers, on the North and the East, and Bay of Bengal on the South, define this study region. The topography of the region is of two distinct types: 1) uphill area - a part of plateau of lateritic soil, partly forested and partly barren, 2) low land area and coastal belt. An intricate network of rivers, canals and roads, built up the ancient transportation system, and navigation formed an important linkage between settlements, some of which flourished as business centers and ports along the rivers and the ancient routes.

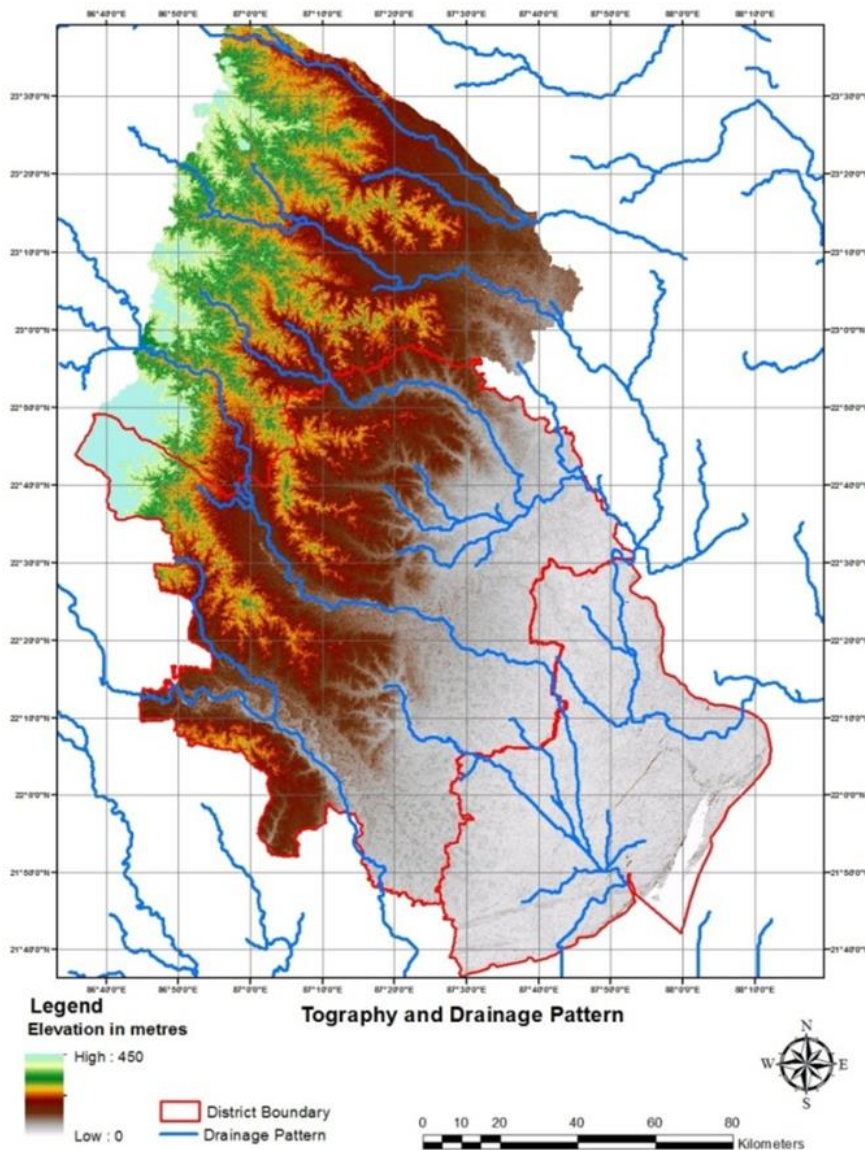


Figure 2. The Study Region - topography and drainage pattern. Courtesy: Author







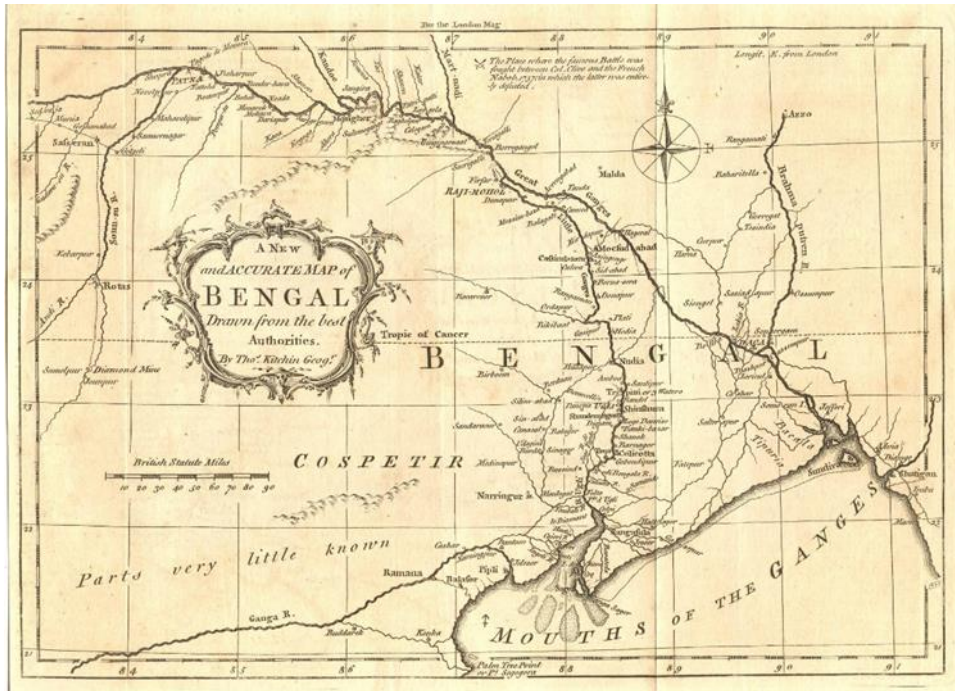


Figure 4. Old Map of Bengal from a map by Thomas Kitchin, 1760. A New and Accurate Map of Bengal, by Thomas Kitchin, drawn for the London Magazine, 1760. Retrieved from <http://www.columbia.edu/itc/mealac/pritchett/00maplinks/colonial/kitchinmaps/bengal1760/bengal1760max.jpg> (accessed on 8 January 2017 )



Figure 5. The study region from Rennel's Map 1776 An Actual Survey, of the Provinces of Bengal, Bahar & c' by Major James Rennell Esq. Engineer to the Honorable the East India Company. 1776, Published by Permission of the Court of Directors from a Drawing in their Possession by A. Dury. Retrieved 8 January 2017 from [https://upload.wikimedia.org/wikipedia/commons/8/85/1776\\_Rennell\\_-\\_Dury\\_Wall\\_Map\\_of\\_Bihar\\_and\\_Bengal%2C\\_India\\_-\\_Geographicus\\_-\\_BaharBengal-dury-1776.jpg](https://upload.wikimedia.org/wikipedia/commons/8/85/1776_Rennell_-_Dury_Wall_Map_of_Bihar_and_Bengal%2C_India_-_Geographicus_-_BaharBengal-dury-1776.jpg)



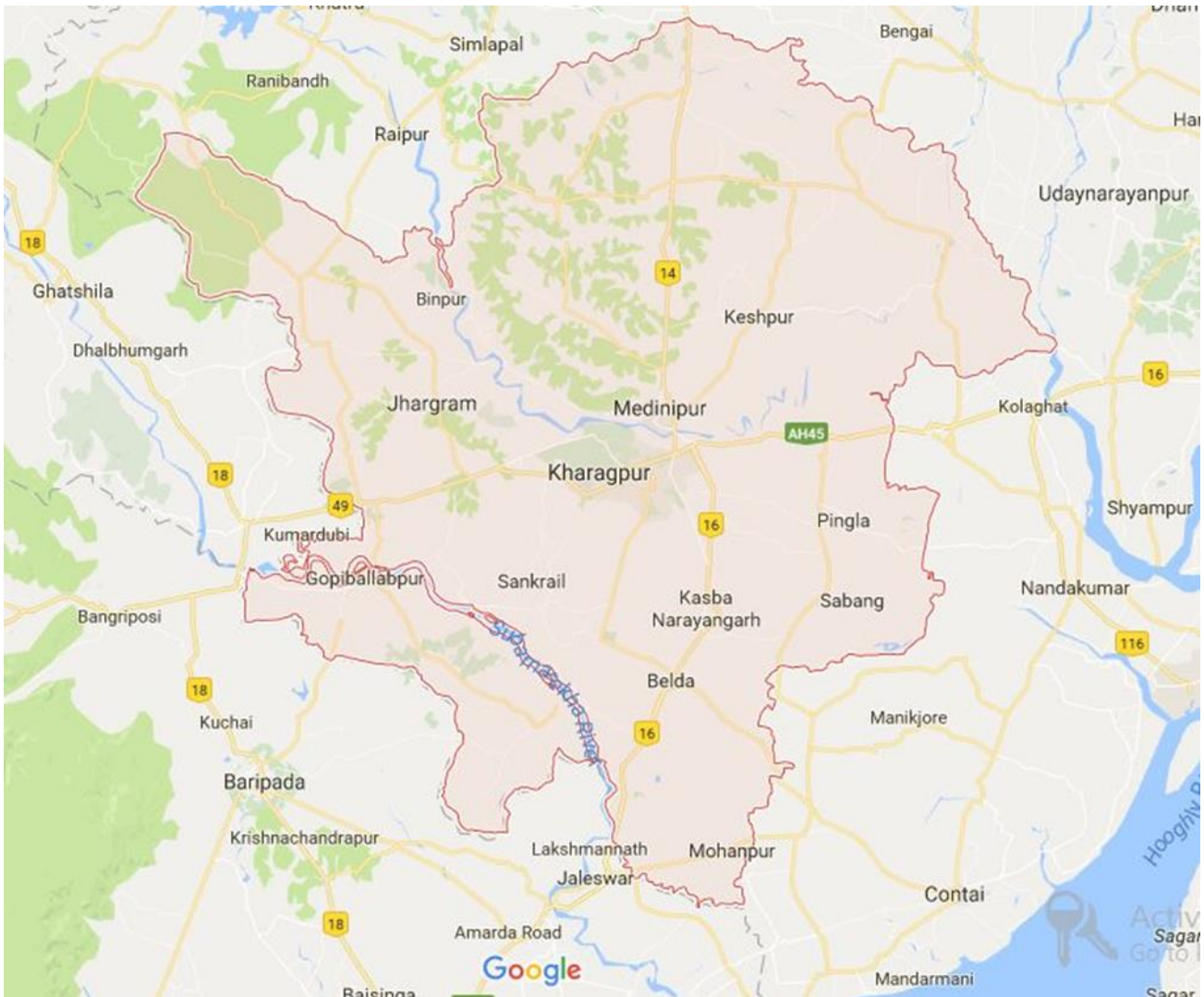


Figure 6. The study region and surroundings at present Retrieved 8 January 2017 from <https://www.google.co.in/maps/place/Medinipur,+West+Bengal/...>

Connecting these places/dots, the Route in question becomes evident.

1) Ancient - History (500 BCE–550 AD); The Maurya Dynasty (322–185 BCE), Maritime tradition of Bengal and political relationship between Sri Lanka (Ceylon) and Bengal;

Place markers:

**Tāmalittī - Tamolook - Tamluk**; Port of Tamralipta as the hub.

**Danta puri - Dantoon - Dantan**, Rise of Jainism and Buddhism; Danta puri is said to have originated from *danta* or tooth - believed that Buddha's tooth was preserved in a Stupa here as a relic.

**Moghalmari** excavation shows early medieval Buddhist settlement. Use of a wide variety of decorative and non-decorative bricks and stucco figures.

2) Gupta Empire (320 to 550 AD); Trade and commerce flourished - Port of Tamralipta continues as the hub. Chinese Buddhist scholar Fa-Hien's travelogue (399 to 414 AD) gives graphic description of Tamralipta.

Place markers:

**Tāmalittī - Tamolook - Tamluk;**

3) Medieval Period (550 AD to 1526 AD); Account of Hieun Tsang, a Chinese pilgrim of Tamralipta,

Place markers:

**Tāmalittī - Tamolook - Tamluk;**

a) Early Medieval Period up to 1300 AD; Bengal as a distinct political and ethnic entity, Sovereignty extended upto Chilka Lake in Orissa;

i) The Imperial Palas (750–1120 AD), Invasions by the Chola (1021 to 1023 CE) and Sena dynasty (1070–1230 AD).

Place markers:

**Myna or Moyena Garh** – a fort with double moats;

ii) Early Turkish rules of Bengal (1227–1283 AD); Islam made its first appearance in Bengal during the 12<sup>th</sup> century with Sufi missionaries. Hindu chiefs and Muslim overlords settled down to some sort of compromise;

b) Late Medieval Period (1300 AD to 1500 AD)

i) Sikander Shah (1358–1390 AD);

ii) Hindu revival (1400–1600 AD)

A distinctive Bengali culture took shape bringing a cultural renaissance, evident in literature and architecture, Inspiration came from Shri Chaitanya (1486–1533 AD), exponent of Gauriya Vaishnavism;

Place marker:

**Puri Road** is the ancient pilgrimage road;

c) Post - Medieval Era (1526 AD to 1818 AD)

4) Mughal Period (1575–1717 AD);

Place marker:

**Medinipur** was a part of Jaleswhar sarkar of Orissa;

5) Maratha invasion (1741–1751 AD); Marathas continued to raid Medinipur,

Place marker:

**Mugal Mari** bares the testimony;

**Raibania** the major fort of the Marathas, now in Orissa;

6) Hindu Raj;

Place markers:

**Bishunpour - Bishnupur**; (700–1800 AD), Malla kings of Mallabhum;

**Burdwan**; A local royalty patronizing local art, architecture and culture;

**Chandercoona - Chandrakona**- a fort;

**Keerpoy - Khirpai;**

**Jarrah - Jara;**

**Gattoul - Ghatal;**

7) Bengal Nawabs (1717–1765 AD);

Place marker:

**Jahanabad;** Permission granted to the French East India Company to establish a trading post at Chandernagore in 1673, and the British East India Company at Calcutta in 1690.

8) Colonial Era (1818 AD to 1947 AD);

a) Portuguese and British East India Company (1818 to 1756 AD);

Place marker:

**Injellee - Hijli and Kejouri**, two islands near Rasoolpour estuary, Injelee or Hijli was a Portuguese settlement and late a battle took place between Job Charnok, who is considered as the founder of Calcutta or Kolkata, battle with Portuguese; The area between Subarnarekha and Rupnarayan was a part of Orissa. Many factories of indigo, silk and other industrial products developed in different parts of this region. Rivers as navigational routes.

b) British rule (1757 to 1858 AD);

Place markers:

**Kejouri or Khejuri;** The first Telegraph line (1851–52) of India established at;

**Kharagpur:** Railway Junction established in 1898–99. Railway townships were planned towns based on the British town planning principles; Influence of colonial architecture on public buildings;

**Hijli, Kharagpur;** Initially planned as a District Head Quarter, of a new district Hijlee and the administrative town was conceptualized as a planned modern township on the line of European and British town planning principles prevalent that time. It was later abandoned but the basic infrastructure remained. The Administrative Head Quarter was converted to a prison for freedom fighters, followed by a communication and signaling station for Allied forces during WWII.

9) Bengal Renaissance (1772–1941);

Place marker:

**Medinipur:** As a district became a seat of learning, entrepreneurs and modern thinking;

10) Independence Movement (1905 to 1942);

Place marker:

**Medinipur town;** The district headquarter became a centre of revolutionary activities; Old prison cells at IIT Kharagpur Campus, now maintained as a heritage precinct;

11) Post Independence (post 1947);

Place marker:

**Kharagpur:** After independence of India, the infrastructure and site of what once planned as a District Head Quarter, became the site of a new Technology Institute, Indian Institute of Technology (IIT) Kharagpur. The first one of the IIT system was thus borne in this building in 1951.

### The Route

Through the timeline and overlaying techniques, the Route was identified.

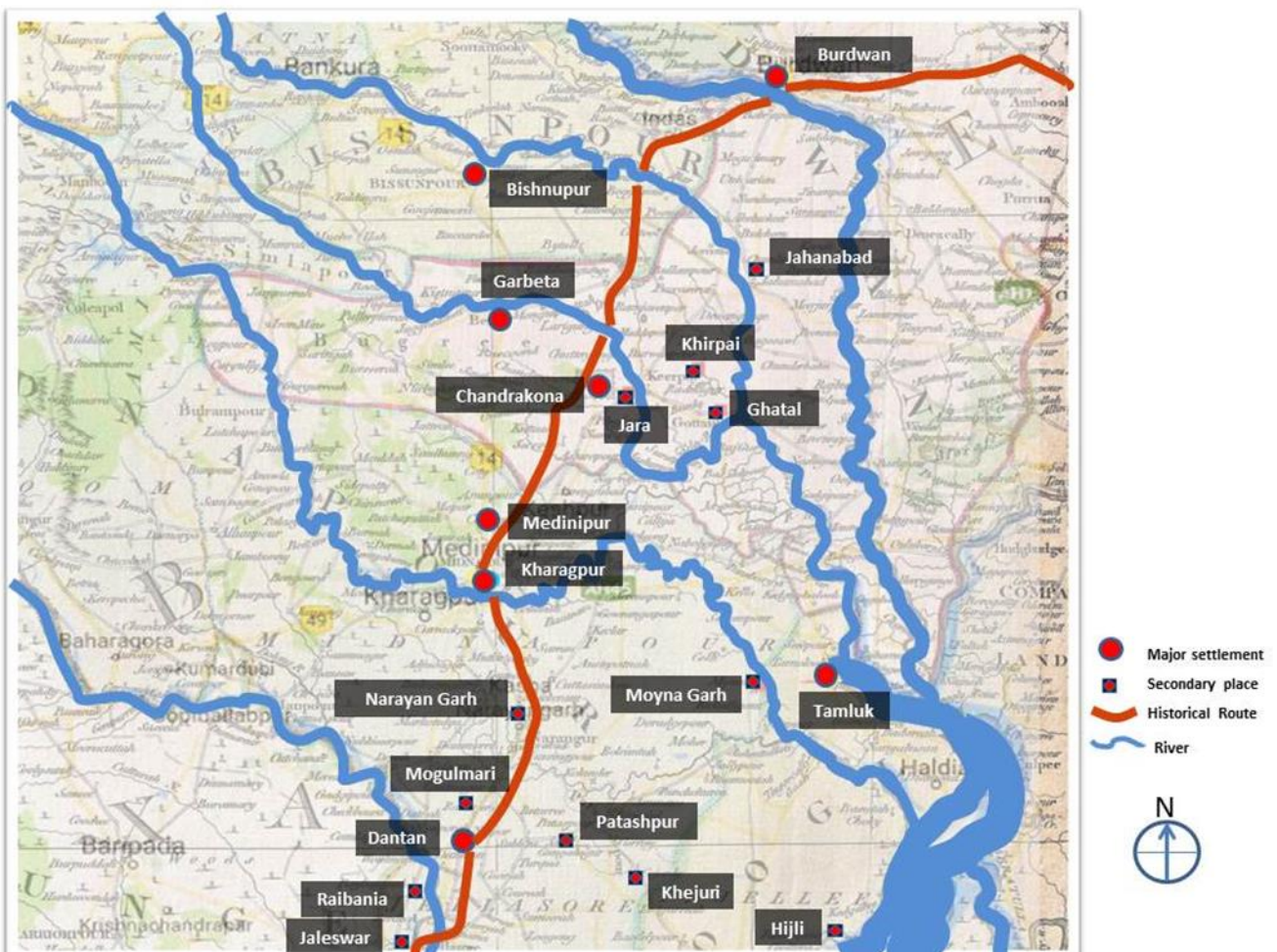


Figure 7. The Route with the Place Markers. Courtesy: Author

This was the route that connected southern India, Maharashtra, passing through Orissa, Medinipur Districts, Burdwan – a renowned principality of this region from the past era, and then proceeded towards North India. A historical route, this now can be partly detectable through highland, locally known as *jungal* or *Nanda Kapasjar maath*; at places it is still evident and is in use. The present highways and local roads almost follow the same alignment, but at places these have been diverted and the old route lie hidden beneath forested land, forgotten and untraceable.

With the railway line connecting Eastern part of India to the South, passing laterally in the East West direction almost midway through the study region, the settlement pattern has undergone changes; rivers no longer serve as the transportation corridors and gradually many of the earlier flourishing settlements with their heritage resources lie in oblivion and seem to be isolated scattered remnants of a past, that does not seem to make any sense now.





Figure 8. Varied types of heritage structures in the study region located in villages and small towns.  
 Courtesy: Author

With this route as the anchor, a story has been reconstructed. The scripts are chronological events in various eras mentioning legends, persons, heritage structures, places and events and this drama is gradually unfolded / narrated through an indigenous art form of *Pattachitra*. As a means of creating a unique visitors experience and as a potential attractor, this traditional indigenous technique of storytelling of *Patachitra*, is being explored.

### Presentation through Pattachitra

Pattachitra, an ancient folk art of Bengal, is appreciated by art lovers all over the world for its effortless style of drawings, colours, lines and space usage. The word *Pata* derived from the Sanskrit word *Patta* means cloth. The painters are called *Patuas*. These *Patuas* do not just paint, they also sing as they unfurl the painting scroll to show it to the audience.



Figure 9. The artists narrating stories through songs accompanied by scroll paintings depicting events and places. Courtesy: Author

These songs are known as *Pater Gaan*. The songs are of wide variety ranging from traditional mythological tales and tribal rituals to stories based on the modern Indian history and contemporary issues like protecting forests and preventing spread of HIV/AIDS. *Patuas* generally use natural colours, which they procure from various trees, leaves, flowers and clays. Recently a training center has been established with the aid of UNESCO in one of the villages of the artist's communities. Youngsters are trained in this intangible heritage. It has become a source livelihood for the artists communities especially women folk. A large percentage of the artists are female. Since last few years, initiated and promoted by a NGO, an annual fair is being organised here which are visited by international, national and local tourists. Few artists now make occasional trips abroad to present this indigenous unique art from through live performance.

For this project, one of the leading *Patuas* - a lady with her brother, has been assigned to compose songs depicting the significance of forgotten Route. Taking the route as the central theme/ thread, each significant phase of the timeline is considered depicting important event/events occurring during that time period/phase. These events and places give the *Patua* clue to narrate the story with support of historical



landmarks as evidences. Each time period / phase becomes a part of the story and the research done in the first part helps to relate past events and places in the modern context.



Figure 10. The team of three *patuas* or artists narrating the story of the ancient route with the help of custom designed scroll painting and accompanied with self composed songs. The ancient route becomes the anchor in songs as well as in the painting depicting scenes and events from different ages. Courtesy: Author

## Conclusion

The process from documentation to mapping and the underlying research to retrace the route is a valuable learning experience. This methodology and its implementation have evolved to provide a useful format for community participation in the area of Place Branding and promotion of local heritage. The indigenous storytelling session will be demonstrated through the recording of a live performance by the artists.

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# Museum Visitors' Profiling in the Experiential Perspective, Value Co-creation and Implications for Museums and Destinations: an Exploratory Study from Italy

*Emanuela Conti, Tonino Pencarelli and Massimiliano Vesci*

*Full Paper*

**Keywords:** desired museum experiences; visitor clustering; value co-creation; museum management; destination management.

## **Abstract**

Cultural heritage management (CHM) literature and visitor studies are important sources of information not only for cultural organizations and museums as an aid in their management and development, but also for tourist destinations due to the fact that the former may play an important role in determining the attractiveness of the latter and may be one reason why tourists choose one travel destination over another. However, as regards museums in particular, the literature reveals that few studies have been designed to fully explore the components of the experience desired by visitors in order to define a correspondingly suitable museum offer, and to underscore the relationship between this offer and destination attractiveness, and thus, to highlight the implications of such studies for destination management.

The present study aims to contribute to filling this gap in the literature; it has one main objective: to cluster museum visitors (Lattin *et al.*, 2003; Wedel & Kamakura, 2002) according to the desired experiential dimensions. To attain this goal, we conducted a survey via face-to-face interviews (Yin, 2009; Brangule-Vlagsma *et al.*, 2002) on a wide sample of visitors to the National Gallery of the Marche, one of the most important Italian, state-run museums focused on the Renaissance period. The museum is located in Urbino, today a World Heritage Site.

The empirical research revealed an interesting and unexpected picture of the Urbino Gallery with five different clusters of visitors identified from the cluster analysis: *Occasionals*, *Aestheticals*, *Routine-breakers*, *Global experientials*, and *Aesthetic learners*. Some clusters may be considered the “classic” museum visitors who are mainly interested in the aesthetic and learning dimensions of the museum experience, while other clusters represent the “new targets” who are interested in other dimensions of experience, such as entertainment, evasion, and/or socialization.

The main managerial implication for the Gallery – and a preliminary implication for other museums - consists in recognizing the importance of investing resources in all five types of desired experiences in order to satisfy a heterogeneous target of visitors. To this end, it is essential for museums (and cultural institutions in general) to collect complementary resources and skills from local stakeholders. In fact, one of the main implications for destinations is to include museums and cultural institutions in the design and management of a destination offer.

## **Introduction**

In the last decade museums have become increasingly marketing oriented due to the increased competition, the reduction of public funding, and the new needs and desires of visitors. Therefore, museums should understand the kinds of desired experiences visitors are in search of in order to create a suitably variegated offer.

Today, cultural consumers do not only seek educational enrichment but also a holistic and engaging experience (Falk & Dierking, 1992; Huh *et al.*, 2006; Di Pietro *et al.*, 2015) which provides pleasure, fun and emotions (Holbrook & Hirshman, 1982; Nowacki, 2010), as well as the opportunity to satisfy their desire to get together and share experiences (Pine & Gilmore, 1999; Bourgeon-Renault, 2000, 2006; Bourgeon-Renault & Debenedetti, 2014; Poria *et al.*, 2006). Furthermore, cultural consumers are more and more interested in co-creating (Vargo & Lusch, 2008; Vargo *et al.*, 2008) their experience (Vom Lehn, 2006), also by means of technology (Marty, 2007; Neuhofer *et al.*, 2014; Arcese *et al.*, 2011).

In order to increase the desirability of a cultural heritage site, cultural heritage managers should customize information, create emotional involvement and a strong connection with the cultural location (Poria *et al.*, 2009; Botti *et al.*, 2015), focusing their attention on the experience-based approach (Pine & Gilmore, 1999; Petkus, 2004; Brida *et al.*, 2015). Consequentially, they will be able to provide a high-quality and highly satisfying experience perceived by cultural visitors to be a good value.

Visitor studies conducted by public agencies are mainly aimed at analyzing the size of cultural visitor flows either to cultural sites or to museums, visitors' personal data (sex, age, educational background, profession, geographical provenance), the reasons for visiting, the ways they visit (with professional guides, self-guided audio guides, etc.) without considering the desired experiential dimensions of the visit to a museum or a cultural site. Visitor experience has recently become one of the major topics explored in the cultural heritage management (CHM) literature, in visitor studies, and in cultural tourism studies but, by and large, it is still in its infancy. The dimensions of museum experience are under-researched and the segmentation of visitors remains merely descriptive and the analysis unsophisticated.

This work aims to contribute to filling this void and proposes a museum visitor clustering method based on the various dimensions of the desired experience. Such clustering criteria may be very useful and effective for museum managers as the desired experiences derive from visitors' individual characteristics (level of education, exposure to art in childhood, personality, etc.) and from their perception of museum attributes (services available, level of crowding, lighting, etc.).

## Literature Review

Tourist-related literature has been traditionally focused on rationality, thus underestimating the importance of affective elements and limiting our understanding of tourists' behaviors (Swarbrooke & Horner, 1999). However, we are seeing that heritage tourists are seeking, more and more, not only the educational value of cultural experiences but they are also looking for emotions (Bigné *et al.*, 2008; Hosany, 2011), leisure, and social interaction that lead to a memorable tourism experience. Other studies have shown that the level of satisfaction derived from a cultural site also depends on the destination attributes (Botti *et al.*, 2014); in other words, it depends on the features and services offered by the tourist destination (Huh, *et al.* 2006). Dwyer *et al.* (2004) and Crouch (2011), however, underline the fundamental role of cultural heritage in contributing to the competitiveness of the destination.

Similarly, as regards museums it has been noted that in order to meet demand requests and remain competitive with increasingly scarce public resources, museums should strive to better understand the characteristics and needs of their audiences in order to set up appropriate offers (Di Pietro *et al.*, 2015; Conti, 2015; Pencarelli *et al.*, 2017). Recent research suggests that the cognitive, emotional (Del Chiappa *et al.*, 2014), and social aspects (Caldwell, 2002; Brida, *et al.* 2017) of a cultural visit should be considered when measuring visitor satisfaction at a museum. Studies on emotions say that emotional affect is influenced by the exhibition environment, ambient environment, and museum size (Jeong & Lee, 2006). In particular, scholars affirm that emotional affect is positively influenced by elements of the exhibition environment (content of the exhibits, methods of exhibition, lighting, etc.) and negatively influenced by the ambient environment (crowdedness, temperature, noise, etc.). The museum size (size of exhibition area and total time spent) is the major contributor to museum fatigue. Interestingly, a study of the archaeological museum G.A. Sanna in Sardinia identified a visitor segment that is based on emotions; it was found that those who experience high emotions during the visit also perceive a higher level of attractiveness and uniqueness of the museum and are ultimately more satisfied with the visit (Del Chiappa *et al.*, 2014).

According to Hood (1983) and Sheng and Chen (2012) there are six criteria for a desirable leisure experience in museums: engaging in social interaction; doing something worthwhile; feeling comfortable and at ease in one's surroundings; being challenged by new experiences; having the opportunity to learn; and participating actively. In a model for the study of the attraction factors of a museum based on push and pull motivations (Yoon & Uysal, 2005), it has emerged that most visitors are driven by push factors (e.g. relaxation) and seek new experiences and the possibility of learning new things. Other authors, on the other hand, have concluded that museum visitors do not seek knowledge enrichment but recreation, entertainment, and social interaction (Nowacki, 2010). Poria *et al.* (2009), focusing their attention on the experientially based approach introduced by Apostolakis (2003), noted the importance of customized information, emotional involvement, and a strong connection with the cultural location. Today, visitor engagement is enhanced by the use of technologies (for example augmented reality), an equally recurring theme in the literature (Addis, 2005; Marthy, 2007; among others).

It can therefore be stated that visitors today can experience different experiential dimensions in museums and do so in a subjective manner. This is consistent with what Falk (2016) states: "the same visitor can engage the same with the same exhibitions and contents in fundamentally different ways depending upon their current identity-related visit motivations" (p. 36). It should be noted more generally that the literature on cultural heritage and museum management acknowledges that there are multiple ways to define the nature and scope of a cultural experience (Laing *et al.*, 2014). In contrast with the information-processing paradigm – where consumers are rational – the experiential paradigm underlines the subjective, emotional, and symbolic aspects of consumer behavior (Holbrook & Hirshman, 1982; Holbrook, 1999; Bourgeon-Renault, 2000; Collodi *et al.*, 2005).

The literature has shown that the motivation of the visit is not positively correlated with the depth / intensity of the experience. Therefore, it becomes interesting, from the management of the museum perspective, to understand not so much the reasons for visiting a museum but the visit experience or the desired dimensions of the experience resulting from visitors' individual attributes (level of education, exposure to art during childhood, level of interest for particular cultural products) and the museum or context attributes (services, location, explanation of works, lighting, the level of visitors involvement proposed by the museum, the technologies offered ) (Poria *et al.*, 2006). Because it has been found that the better the visitors' expectations are met the greater their satisfaction is, it is interesting to understand, first and foremost at the conceptual and empirical level, the features and intensity of the anticipated experience and the importance attached to them.

The research question is therefore the following: *What clusters of visitors can be identified based on the expected experiential dimensions identified in the literature?*

The paper aims to contribute to filling the existing gap by proposing a visitor profiling which uses five dimensions of the expected experience, capable of explaining the possible needs and desires of museum visitors. These dimensions are drawn from the literature, four of them from Pine and Gilmore (1999), namely, aesthetic, learning, entertainment, and evasion dimensions - and the fifth, the social dimension suggested by various authors (Shen & Chang, 2012; Caldwell, 2002; Martin-Ruiz *et al.*, 2010; Brida *et al.*, 2017).

Before describing in more detail the above-mentioned experiential dimensions, it is necessary to state what is meant by *museum experience*, in this work. We affirm (starting with the definition by Pine & Gilmore, 1999) that a museum experience can result from an economic offer based on high quality services that the consumer experiences as personal and unique events in which she/he is engaged on the emotional, physical, intellectual and or even spiritual level. Museums may co-create experiences with cultural consumers by utilizing the five dimensions suggested above.

According to Pine and Gilmore (1999), organizations may co-create emotions by entertaining customers, by allowing them a chance to escape from reality, by educating them, and by presenting them with aesthetic objects or places to see. The authors have diagrammed the process of engaging a client/guest, using the following two dimensions (see Figure 1): 1) the level of guest participation (from passive to active participation of the client) and 2) the type of contextual connection or involvement that links clients to the event or the performance (from absorption in which the experience 'penetrates' into the person through the

mind - e.g., watching a film on TV - to immersion, in which the person ‘dives into’ the experience by physically or virtually taking part in the experience itself - e.g., watching a film at the cinema along with other spectators.

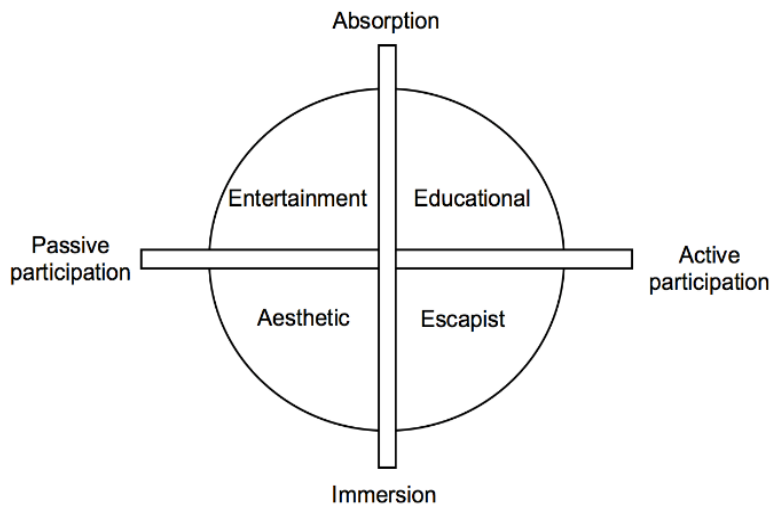


Figure 1 - The four dimensions of experience

Source: Pine and Gilmore, 1999, p. 30

As Pencarelli and Forlani (2016) explain: “these fields are combined in differing degrees and proportion, depending on the type of experience and guest involved, thus contributing to the creation of unique and personal events. The level of involvement of the client/guest depends on both the person enjoying the experience (high or low propensity to engage in any given event) and on the organization staging the event (degree of involvement it requires)” (p. 209).

According to Pine and Gilmore (1999) model, when visitors take part in an aesthetic experience they want “to be” there, to immerse themselves in a museum and leave it (but not themselves) untouched. In the realm of entertainment visitors want to “stay”, to watch and contemplate and they passively absorb experiences through their senses. During an escape experience visitors want to “do”, to try something and they are deeply immersed and have an active role, such as making questions to a museum guide or using interactive technologies. Finally, in an educational experience, visitors want “to learn” about art, history, etc. and require active participation and absorption.

The fifth dimension of experience useful for the profilation of visitors is socialization, understood as the ability for / possibility of social interaction, that is, the exchange of information and views of visitors with museum staff and among themselves. Similar to the evasion experience, in the social experience the visitor is called upon to play an active role (ask and/or answer questions) and is immersed in the museum, but unlike the evasion experience (which may be individual), here he/she always interacts with other people. Each visitor may be interested in living one or more of these five experiential dimensions, and museum managers should know what experiential dimensions (and their combinations) are most desired in order to set up appropriate offers.

### Research Design

The study adopted as a survey technique the personal interview, based on a structured questionnaire (Molteni & Troilo, 2007) consisting of two sections. The first section serves to identify the following visitor



information: geographic origin, whether it was a first or a return visit, the preferred mode used to visit museums (freely, with a guide, audio self-guide, indifferent), the scope of the visit (Ducal Palace, the National Gallery of the Marche, Urbino, other), whether the visitor has collected information before the visit, the types of ticket bought (full or reduced price, free monthly Sunday). The second part aims to investigate the aspects regarding services and experiences while visiting the Gallery, using a five-point Likert scale (where 1 = not satisfied and 5 = very satisfied): the professionalism / courtesy of museum staff (custodians), the importance attributed to technology during the visit, museum services such as ticket offices, guides, audio guides, bookshop, bar / restaurant, cloakroom / luggage storage, services for the disabled (e.g. elevator). In addition and still on a scale from 1 to 5, the questionnaire asks the visitor to evaluate before and after the visit, the importance of each of the five experiential dimensions discerned in the literature: aesthetic, learning, entertainment, evasion, and socialization.

The authors are aware that the five experiential dimensions have often been measured with a multi-item approach (Kim *et al.*, 2012; Sheng & Chen, 2011; among others). In some cases, measurements with only one item for each variable (Smith *et al.*, 1996; Del Chiappa *et al.*, 2014; among others) are also found in the literature. We chose to use only one item for each experiential dimension in order not to make the questionnaire too long and to reduce the set response. Furthermore, for each experiential dimension a precise definition taken from the literature (see paragraph 2) has been given to respondents prior to the question in order to avoid subjective interpretations.

The visitor was also asked if s/he was planning to return to the Urbino Gallery.

In this research we focus on museum visitors' profile as we cluster a museum visitors' sample of 400 visitors of the National Gallery of the Marche located in Urbino. Museum visitors' segmentation refers, instead, to museum visitors of Italian museum visitors or Urbino visitors. In fact, Kotler (1991) defines segmentation as "the act of dividing a market into distinct groups of buyers who might require separate products and/or marketing mixes" (p. 263). However, the difficulties to divide customers or visitors in different groups are the same both for markets and convenience samples. Dowling *et al.* (1993) noticed that while business marketing managers generally recognize the need to develop an appropriate segmentation procedure for their markets, academic research has yet to adequately satisfy this need. There are at least four reasons for this theory-practice gap: 1) lack of generalizability (it often employs small convenience samples), 2) product related segmentation (much segmentation research is narrowly focused on either a single product within an industry or market), 3) instability of segments (most segmentation studies employ cross sectional data and researchers rarely attempt to determine if segments change over time especially in exploratory study) and 4) use of Mixed Bases for Segmentation (the theoretical objective of segmentation is to produce groups of firms that are homogeneous within and heterogeneous between with respect to benefits sought, but segmentation researchers do not still agree on appropriate criteria for the clustering of firms in a market).

To bridge the theory-practice gap, the literature suggests the selection of different sets of variables to segment and then describe markets and that the segmentation variables must also help to identify target markets and develop marketing strategy (Verhoef *et al.*, 2002). Furthermore, the segments formed must exhibit varying propensity to buy a seller's product or service offering. Thus customer benefits or needs form the most logical segmentation bases (Haley, 1968; Moriarty & Reibstein, 1986; Urban & von Hippel, 1988). The authors of this study are aware of the theory-practice gaps in research segmentation and try to fill the above gaps. In particular, the experiential dimensions, that is the segmentation variables help to identify the visitors' clusters, their needs and desires, and together with other descriptive variables enable to profile the visitors of the sample.

In this study we used a convenience sample: a total of 400 personal interviews were conducted in the period from 15 December 2015 to 31 March 2016. Interviews were conducted at regular intervals each week and visitors are heterogeneous by gender, age, education, geographical origin, cultural consumption behavior. Furthermore, visitors were interviewed at the end of the visit for about 15 minutes and there has been a very low refusal rate. However, as we will explain in conclusions in order to generalize results to all guests of the Gallery of Urbino it is necessary to test again the museum profile on various samples over time.

To achieve the objective, on the basis of the classification proposed by Wedel and Kamakura (2002), a post-hoc classification technique (in particular a cluster analysis) was chosen in this study that defines groups based on data. In particular, within the family of cluster analysis algorithms, a non-hierarchical classification method was chosen. The reasons that led to this choice are many: non-hierarchical methods can be applied on quantitative variables and are optimal in the case of large samples (unlike hierarchical methods that prefer narrow samples). Another undoubted advantage of non-hierarchical methods is that they are less sensitive to outliers (Ketchen & Shook, 1996). In this study, the segmentation of visitors was achieved by applying the k-media algorithm (Hair, *et al.*, 2010). The variables used for segmentation are represented by the five experiential dimensions described in the literature review (aesthetics, learning, entertainment, evasion and socialization). Prior to the implementation of the cluster analysis, the segmentation variable data was standardized.

In order to articulate a more complete explanation and avoid what has been pointed out in the literature regarding the fact that sometimes socio-demographic descriptors may be of little significance (Miceli *et al.*, 2007), other descriptive variables of consumer behavior were used during the experiment, to better understand the characteristics of the different segments. The following analyses were carried out, for this reason:

- analysis of contingency tables to cross the cluster membership with the selected quality variables;
- variance analysis using Bonferroni's post-hoc tests, in the case of significant Levene test, and Games-Howell, in the opposite case (Toothaker, 1993).

### Findings and discussion

For the clustering of visitors to the National Gallery of Marche, solutions from three to seven clusters were examined. The five-cluster structure appeared to be the one which most represents a useful compromise between the different selective criteria mentioned (Table 1). The segments were labeled based on the centers of the different clusters as follows: Occasionals, Aestheticals, Routine breakers, Global experientials, Aesthetic learners.

Table 1 – Cluster analysis endpoints (standardized values)

Clusters/Dimensions	Cluster 1	Cluster 2	Cluster 3	Cluster 4	Cluster 5
	n=38 (9,50%)	n= 76 (19,00%)	n=84 (21,00%)	n=143 (35,75%)	n=59 (14,75%)
desired aesthetic experience	-1,81	,64	-1,15	,62	,49
desired learning experience	-1,20	-,77	-,35	,84	,22
desired entertainment experience	-1,10	,03	-,08	,67	-,85
desired evasion experience	-,84	-,18	,31	,57	-1,06
desired social experience	-,24	,27	,24	,42	-1,56
Cluster Label	The Occasionals	The Aesthetics	The Routine's breakers	The Global experientials	The Aesthetic learners



The first cluster was called *Occasionals* since all the discriminating factors have very high values and all are negative. However, the aesthetic, learning, and entertainment factors showed the absolute highest values of all the groups. These visitors have low expectations for any type of museum experience, and especially not for the most sought-after classic ones in the aesthetic and learning dimensions, so they may appear to be casual users who went to the Gallery “by accident”. In terms of number, it is the smallest cluster (9.50% of the entire distribution).

The second cluster was labeled *Aestheticals* because they are highly sensitive to the aesthetic factor (which has the highest positive value among all groups) while at the same time, they also pay particular attention to entertainment and socialization, with negative values given to the remaining factors. It is as if the members of this group have great expectations regarding the aesthetic features of the works of art they will visit, but in reality, it is not for learning purposes alone, but to be together and interact with other people.

The third cluster belongs to those who seem to have a strong expectation of evasion and socialization. They do not really care about the aesthetic or the learning aspect. That is why this group was labeled Routine-breakers. They are "modern" visitors who enjoy the museum as a recreational place where they can play an "active role" and spend time with other people. It is the second largest group (21% of the sample).

The fourth group is the largest one (35.75% of the total). The distinguishing feature of this group is that it presents the highest positive values for all of the discriminating variables, with the exception of the aesthetic variable (which in any case has the second highest positive value among the five groups). For this reason, the members of this group were called *Global experientials*. They make a museum visit with high expectations in all areas. Compared to what typically characterizes a cultural consumer, for this group the experience of visiting a museum is not related to a single factor or even just a few of them, but it is absolutely multifactorial and all-encompassing, i.e., global.

The fifth group presents three centroids of discriminating factors with negative values and of these, two with the highest absolute values. Unlike the first group, however, they have certain expectations regarding the aesthetic and learning benefits that the visit could provide them. That is why they have been called *Aesthetic learners*. In fact, compared to 47% of occasional visitors who cite visiting Urbino as their reason for seeing the museum, 39% of Aesthetic learners cite visiting the National Gallery as their primary aim (where in other clusters this proportion does not exceed 21% and even in the Aesthetic learners is just 12%).

### Visit-related Characteristics by Clusters

Table 2 shows the values related to travel characteristics and museum structure that appear statistically different in each cluster. In particular, the country of origin percentages are essentially distributed equally in the five clusters, with the exception of clusters 1 and 4, in which foreigners (non-Italians) are present in greater numbers than in the other three. In fact, while in the clusters 2, 3, and 5 foreigners do not exceed 7%, both in cluster 1 and in 4 foreigners make up about 14% of the total.

As for other data regarding visits to the museum, a large majority (87%) of Routine-breakers (cluster 3) had visited the museum for the first time. As concerns visitor preferences, Global experientials generally prefer to use guides, self-guided audio, or published texts (58%) whereas Occasionals for the most part (53%) prefer to visit the museum freely. Also, the majority of Global experientials (52%) and Aesthetic learners (51%) research and retrieve information before visiting the museum, both groups showing figures that are comparatively higher than the other three clusters for this same variable: 37% (Occasionals & Aestheticals) or 31% (Routine-breakers). It should be noted that roughly a quarter of Routine-breakers (24%) and Aestheticals (25%) take advantage of the free entrance every first Sunday of the month (a feature of all state-run museums in Italy). This is in stark contrast to the Occasionals cluster which shows that 92% pay for their entrance ticket. The Aestheticals, Routine-breakers and Aesthetic learners, especially, are those visitors whose main travel motive is to come to visit the city of Urbino (64%, 65%, and 64%, respectively).

Table 2. Visit-related characteristics by clusters

Factors						Total	$\chi^2$	Sig. Level
	Cluster 1 <i>The Occasionals</i>	Cluster 2 <i>The Aesthetic</i>	Cluster 3 <i>The Routine's breakers</i>	Cluster 4 <i>The Global experientials</i>	Cluster 5 <i>The Aesthetic learners</i>			
<b>Origin</b>							10,133	0,038
Italy	87%	96%	93%	86%	97%	91%		
Other countries	13%	4%	7%	14%	3%	9%		
<b>First visit</b>							11,368	0,023
Yes	66%	66%	87%	74%	75%	75%		
No	34%	34%	13%	26%	25%	25%		
<b>Mode of visit</b>							15,467	0,051
Autonomously	53%	43%	43%	38%	44%	42%		
Guide, audioguide	39%	53%	43%	58%	44%	50%		
The same	8%	4%	14%	4%	12%	8%		
<b>Reason for visit</b>							18,989	0,089
National Gallery	39%	21%	19%	18%	12%	20%		
Ducal Palace	8%	13%	14%	21%	22%	17%		
Urbino	47%	64%	65%	58%	64%	61%		
Other	5%	1%	1%	3%	2%	2%		
<b>Information before visit</b>							13,399	0,009
Yes	37%	37%	31%	52%	51%	43%		
No	63%	63%	69%	48%	49%	57%		
<b>Type of ticket</b>							20,943	0,007
Full	92%	62%	65%	68%	80%	70%		
Reduced	3%	13%	11%	13%	15%	12%		
Free entry*	5%	25%	24%	19%	5%	18%		

\*Every first Sunday of the month

### Visitor Satisfaction, Overall Satisfaction, and Intention to Revisit by Clusters

Table 3 shows the mean satisfaction scores for the various attributes, by cluster. The Anova results confirm that the five clusters differed significantly in their level of satisfaction with the attribute of staff courtesy. The significant difference is between cluster 1 and cluster 4: the satisfaction level of the Occasionals (4.45) is significantly lower than that of the Global experientials (4.75). And this difference is mirrored in the proportions calculated in relation to the intention to return to the Gallery: only 87% of Occasionals are likely

to return to the Gallery compared to 94% of the Global experientials and 95% of the Aesthetics who expressed their intention of revisiting the Gallery.

A further difference should be noted between clusters 3 and 5: 10% of the Routine-breakers and 15% of the Aesthetic learners are undecided about whether they will be revisiting the Gallery or not. Overall satisfaction discriminates between the first and second clusters and even between the first and the fourth. Indeed, the Occasionals represent the most “unhappy” cluster (4.08) as opposed to the Aesthetics and the Global experientials who are the happiest (4.47 and 4.48, respectively). Again, the Occasionals stand out as the cluster that assigns the least importance to the use of technology during the visit (3.79), contrasting with the Aesthetics who, conversely, represent the group of visitors who assign the greatest importance to technology (4.29).

Table 3. Visitor satisfaction, overall satisfaction and intention to revisit by clusters

	Cluster 1	Cluster 2	Cluster 3	Cluster 4	Cluster 5				
Factors	<i>The Occasionals</i>	<i>The Aesthetics</i>	<i>The Routine's Breakers</i>	<i>The Global experientials</i>	<i>Aesthetic Learners</i>	Total	$\chi^2$	Sig. Level F	Sig. Level
<b>Revisiting intention</b>							21,307	0,006	
Yes	79%	95%	85%	94%	80%	88%			
No	13%	1%	6%	3%	5%	1%			
I do not know	8%	4%	10%	3%	15%	11%			
<b>Satisfaction</b>									
Professionality/									
Kindness of the Staff	4,45	4,58	4,57	4,75	4,66	4,64		2,483	0,043
Importance of technology	3,79	4,29	4,17	4,10	3,92	4,09		2,31	0,06
Overall satisfaction	4,08	4,47	4,36	4,48	4,36	4,40		2,75	0,03

## Conclusions

This piece of research represents an original contribution to the literature on visitor studies and on museum and destination management as it proposes a quite sophisticated clustering of visitors to the National Gallery of the Marches of Urbino. The visitor profiling proposed is based on five desired experiential dimensions – aesthetic, learning, entertainment, evasion (Pine & Gilmore, 1999), and socialization (Rowley, 1999; Caldwell, 2002; Shen & Chang, 2012; among others) – and it identifies, from the combination of these dimensions, five clusters of visitors: Occasionals (9.5%), Aesthetics (19%), Routine-breakers (21%), Global experientials (35.75%) and Aesthetic learners (14.75%).

The study highlights an interesting and unexpected picture of the museum, as the visitors to the Gallery of Urbino are very heterogeneous. In fact, only 50.5% of the sample fit the image of the traditionally understood visitor, and they are the Global experientials (35.75%) and the Aesthetic learners (14.75%), while the remaining 49.5% includes "new targets" of visitors that should be studied, monitored, satisfied, and kept loyal.

Going into more detail, among the first 50.5% of the sample, the Global experientials are those visitors who seek all the types of museum experiences, so, in addition to learning and having the pleasure of being in a beautiful place, they also want to enjoy the other experiential dimensions of the visit (entertainment, evasion, and socialization) to achieve complete visit satisfaction. These visitors are the most satisfied of all. The Aesthetic learners, instead, constitute a niche of visitors who are very interested in aesthetics and learning; they are the “true visitors” in the narrowest and most traditional sense of the term, as they are

cultured individuals, with a high level of education and without any expectation of entertainment, evasion, or socialization. The remaining half (exactly 49.5%) of the sample includes two new types of visitors (40% of the sample) represented by individuals who conceive and live the museum experience in an innovative, contemporary and different way: Routine-breakers (21%) and Aestheticals (19%). Also included in this half of the sample is the smallest cluster, the Occasionals (9.5%), made up of visitors who come to a museum only occasionally and who will unlikely ever become more habitual visitors.

These results belie the myth about the museum visitor-type as being well-educated, learned, whose first desire is to learn new things in a museum, etc. Thus our evidence confirms the findings in recent literature on cultural consumers and museum visitors which state that visitors do not just search for cultural enrichment but also want to live emotions, have fun, and socialize (Holbrook & Hirshman, 1982; Pine & Gilmore, 1999; Nowacki, 2010; among others).

There are several main managerial implications for the Gallery of Urbino; as for other museums, they are preliminary at this time, as the results of this study are not generalizable. The suggested paths of action are outlined as follows:

- undertake further study of the visitor profile to have an up-to-date map of the types of museum visitors and design ad hoc offers in order to increase the level of satisfaction;
- since there is a sizeable proportion of visitors (50.5%) who represent the most reliable and "classic" type of people who are very open to learning and appreciating the aesthetic aspects of art, the Urbino Gallery should continue to conserve and restore the Ducal Palace and should invest heavily in the museum visit, as a whole. This should include aspects such as updating and improving the information provided in the halls (placards and posters) and attached to the works of art (captions), as well as materials offered free of charge in the ticket office (e.g. brochures and leaflets), material on sale in the bookshop; the audio guides should be kept current and professional guides should always be well-trained and passionate about their work;
- considering that a good percentage of visitors are "modern" (40%) or interested in entertainment, evasion and socialization, the Urbino Gallery could allocate resources to offer these typologies of experiences and give visitors the opportunity to have an active role (e.g. with touch screens, with modern audio guides, with professional guides who stimulate and interact with visitors to engage them, etc.). At the same time, however, it should also invest in entertainment and relaxation aspects, such as creating sitting areas (e.g. benches) along the museum's tour route – something that is not currently available; it could enrich the bookshop and improve the bar / food services sector. In addition, socialization among the visitors should also be facilitated, for example by providing dedicated spaces where visitors can interact with one other, and also by organizing ad hoc events.

In order to satisfy its visitors, the Gallery of Urbino could design and set up offers using complementary external resources and it should foster collaboration with its stakeholders and the local community. The managerial implications, which originate from the clustering of this study, for the city of Urbino and the tourist destination as a whole, are expressed in the following suggested courses of action:

- the identification of the 5 clusters proposed in this study suggests possible managerial implications for the city of Urbino, where the museum is located, especially if Urbino wants to qualify and distinguish itself as a cultural tourism destination (Pencarelli & Forlani, 2016);
- improve the basic tourist services of the city and the surrounding area (catering, tourist information office, adequate accommodation, trade, etc.) and the services which support the Museum (museum transportation services, parking facilities, etc.) as the National Gallery of the Marche represents the most important cultural attraction of the Marche Region; in addition, visitors seeking entertainment and socialization would probably appreciate evening events held in the city or in the surrounding area;
- encourage the creation of networks between the Gallery and other museums or local cultural institutions and build relationships and networks between the Gallery and stakeholders (schools, transportation companies, catering, hotels, public administration, etc.) and with the local community

in order to get complementary resources and professional expertise to build offers suited to the various types of visitors identified. Since 50.5% of visitors are very interested in the learning and the aesthetic dimensions, it is plausible that they might like to visit other museums and / or cultural sites in the city and in the vicinity. Furthermore, because the most satisfied visitors, such as the Aestheticals and the Global experientials, also have the highest intention of returning to the Gallery and to Urbino, it is suggested that these could become the main ambassadors of the Gallery in terms of destination communication through word-of-mouth. Therefore, by focusing on these highly motivated visitors not only to the museum but also to the territory, it could be possible to broaden the opportunities for creating value for the whole community, starting from the showcasing of the well-developed tourist activities in the area such as exploring the local food and wine, shopping, walking tours, etc.

Ultimately, the quality of the services offered in the destination where the museum is located can affect visitor satisfaction with the museum experience. At the same time, the experiential offer of the museum can produce value for territories and affect the perception of and satisfaction with the tourist experience. It can be concluded that a good museum experience and design should fall within the broader design, marketing, and management of a destination, so that a large spectrum of actors / users may reap the resulting benefits.

The main limit of the study is related to the representativity of the sample. Future research will have to be carried out on large samples of visitors of the National Gallery of the Marche and at different times to confirm whether or not the validity of the results of museum visitors profiling emerged in this study. Likewise, future studies should provide for appropriate cluster stability tests in order to allow the generalizability of the results that can only be considered valid for the case analyzed.

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# A Social Media Campaign to Raise Awareness About Violent Heritage Destruction. The Case of #faces4heritage

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*Full Paper*

**Keywords:** heritage destruction; social media awareness campaign; Unite4Heritage; countering violent extremism.

## **Abstract**

In recent years, violent extremism has been frequently covered by international media not only for crimes against people's lives, but also for the voluntary destruction of heritage – especially in the Middle East. The aim of terrorists is to get higher international visibility, to draw attention to their ideology, to recruit new members, and to humiliate identities and cultures not aligned with their worldview. Heritage destruction, though, has other goals than just ideological ones: in fact, there is also an extensive and well organized looting of antiquities that allows to fund military activities.

Tourism is directly affected by such events, both because of the atmosphere of terror they create that curbs visits to attacked places, and because of the loss of cultural values, which is one main driver of tourism.

While Information and Communication Technologies (ICTs) have been extensively used to record 3D images of heritage monuments at risk of destruction, and to support their restoration or 1:1 reproduction, they can be exploited to raise awareness about such issue, and to publish counter- and alternative-narratives that underline the violence of destructions, as well as the importance of heritage preservation and presentation.

Governments all over the world are launching different initiatives to combat the phenomenon, and UNESCO has led the online movement through its global #Unite4Heritage campaign. In the paper, the initiative #faces4heritage is presented, which has been designed in the frame of a challenge sponsored by the Government of the United States and aimed at supporting #Unite4Heritage. It addressed mainly the 'uncommitted' population, travelers, and professionals in the heritage conservation and communication fields. The paper presents its conception, design, and implementation, as well as its diffusion on Facebook and Twitter. It analyses data about its reach, and the features of messages that got more interest by its intended publics.

Results not only provide a vivid representation of the role that ICTs can play to raise awareness on an issue of utmost importance, but they provide also useful information and advice on how to plan and execute social media campaigns in the domain of heritage preservation and promotion.

## **Introduction**

The intentional destruction of cultural properties by fundamentalist groups has grown so much and so fast in the last few years, to be defined by France Desmarais – Director of Programs and Partnerships at the International Council of Museums – as “the largest-scale mass destruction of cultural heritage since the Second World War” (reported by Myers and Kulish, 2016, para. 10). The list of intentionally damaged heritage properties counts treasures of different eras and civilization. Just to name a few of them, parts of the archaeological sites of Hatra and Nimrud in Iraq have both been destroyed by the ISIL group in 2015, and the ancient city of Palmyra in Syria has been repeatedly attacked by ISIL since 2011. Extremists use to circulate videos on social media showing their violent destructions with hammers, bulldozers and explosives.

The rationale behind these destructions is, mainly, of a religious nature. Fundamentalist groups aim at removing all the religious symbols from the areas under their control, so to easily instill their ideology; they claim some legitimacy and justification of their violent acts blaming other religious expressions to be blasphemous. In the case of ISIL, the primary target are the cultural expressions of their ‘near enemy’, namely anyone who does not follow their strict Sunni interpretation of Islam, and other religious minorities and, secondly, the pre-Islamic heritage (Romey, 2015). ISIL also sees the practice of archaeology as a foreign import that fans Iraqi nationalism and impedes their ultimate goal, which is to subsume modern nations of the Middle East into a wider caliphate encompassing the entire Muslim world.

The most severe consequence of the destruction of heritage is the loss of cultural identity and shared history. In fact, the world’s collected artworks, religious sites and cultural artifacts are not just things owned by someone, but rather part of people’s identity. They are the sum of what humankind has achieved through its various histories (Sorrel, 2016). The destruction of heritage also impedes future historical and archaeological studies, and it denies tourists and residents the possibility to enjoy the legacy of the past.

Given the increased concern about violent acts targeting heritage sites, UNESCO has adopted in 2003 the ‘UNESCO Declaration concerning the Intentional Destruction of Cultural Heritage’, which adds to the ‘List of World Heritage in Danger’ signed in 1972. There, it is acknowledged that “cultural heritage is an important component of the cultural identity of communities ... so that its intentional destruction may have adverse consequences on human dignity and human rights”. All States are responsible to protect their cultural heritage – especially when engaged in armed conflicts –, and there is a need for more international cooperation to fight against the intentional destruction of heritage, such as information exchange, consultation, provision of educational and raising awareness programs, judicial and administrative assistance (UNESCO, 2003).

In addition to the material destruction of heritage sites, extremist groups are engaged in an extensive looting and trafficking of antiquities. Though this illicit trade has reached new levels thanks to the control of ISIL militants in Syria and Iraq (Myers & Kulish, 2016), it is a worldwide problem; it is, for instance, strongly present in the context of Indian temples (Hannan, 2016). The reasons for pillaging heritage sites are multiple: on the one hand, antiquities constitute a main source of financing for terrorist groups; on the other hand, it is another way to erase cultural heritage and to make it disappear from its original locations (Parcak, 2015).

There is a need to strengthen international cooperation with respect to law enforcement and criminal prosecution (UNESCO, 2016), as well as to raise awareness of potential buyers of the links that antiquities of uncertain origin may have with terrorist groups. The phenomena of destruction and looting of heritage are so serious, that they have recently been acknowledged as ‘war crimes’. The triggering event that raised international awareness about ‘cultural terrorism’ was the appearance of Ahmad al-Faqi al-Mahdi – an ISIL militant – at the International Criminal Court in The Hague in 2016. He was found guilty of the destruction of several religious buildings and unique manuscripts, occurred in Mali in 2012. This represented an unprecedented situation for international law (Crampton, 2015).

The relation among terrorism, heritage destruction and tourism is multifaceted. On the one hand, terrorist activities create an atmosphere of uncertainty and fear – that is indeed their primary goal –, which prevents visits to attacked places. On the other hand, destruction of heritage means the loss of cultural and historic values attached to such heritage, which represent main drivers of tourism. Also, violent actions of terrorists against heritage recalls the importance of promoting a more conscious tourism behavior at any level, which is respectful of places and artifacts as signs of people’s culture and identity.

In this paper, an initiative is presented called *#faces4heritage*, which was developed in the frame of a global university challenge, with the goal of countering violent extremism. A campaign through social media was designed and implemented, to raise awareness about the intentional destruction of heritage, especially in the Middle East, to spread an alternative narrative about the universal value of cultural heritage, and to support actions of tourism and heritage professionals. The realization process of the campaign is described, and an analysis of its performances on social media is provided.

## Literature Review

### Countering Violent Extremism

The term *Extremism* “can be used to refer to political ideologies that oppose a society’s core values and principles. In the context of liberal democracies this could be applied to any ideology that advocates racial or religious supremacy and/or opposes the core principles of democracy and universal human rights. The term can also be used to describe the methods through which political actors attempt to realize their aims, that is, by using means that show disregard for the life, liberty and human rights of others” (Stevens & Neumann, 2009, p. 10). Violent extremism is closely related to terrorism, which has called an increased attention after the events of 9/11. Terrorism involves a large amount of communication activities and propaganda, aimed at attracting followers and convincing them to approve the use of violence and ultimately participate in its use for ideological (political and/or religious) goals (Stevens & Neumann, 2009; Schmid, 2014).

It must be avoided the mistake of associating violent extremism and terrorism to the Islamic world only, since they have taken many other forms, varying from neo-Nazi movements to Ku Klux Klan supporters. The drivers vary significantly across different contexts, being them economic, sociological or psychological conditions. It is generally acknowledged that there is not a “single path to radicalization and no ‘formula’ to predicting who will be radicalized” (Development & Training Services - dTS, Inc., 2015, p. 3), as well as “no one tool or approach that will put it to rest forever” (U.S. Department of State & USAID, 2016, p. 4).

Ideologies driving terrorist acts and narratives employed by extremists to justify them are, though, similar across different movements. They aim at radicalizing vulnerable individuals and communities, as well as at inspiring to concrete actions (and often, terrorist acts) those who have already embraced their ideology. Violent extremists’ narratives – be they of ideological, political, moral or religious nature – are generally based on perceived or real injustices. They usually propose simplistic and one-dimensional argumentation, combining “historical and political facts with half-truths, misinformation and conspiracy theories” (Briggs & Feve, 2014, p. 5), thus promoting “black and white thinking, de-sensitisation, de-humanisation, distancing of the other, victimization and calls to activism and militancy” (Briggs & Feve, 2013, p. 4).

The term Countering Violent Extremism (CTV) is referred to all those initiatives aimed at reducing “the spread and impact of ideologically motivated violence” (dTS, 2015, p. 3). In addition to increasingly advanced security-based counter-terrorism measures, governments have recently started to dedicate more attention and efforts to these ‘soft-power approaches’, seeking to counter in a proactive way the attempts of violent extremists to recruit and mobilize their followers, and to address specific risk factors that facilitate extremist radicalization.

### Violent Extremism and the Internet

Violent extremists make an extensive use of the internet to spread their messages and achieve their aims, be they engagement, radicalization, recruitment or call to action.

The use of the internet by extremists poses two major challenges to the online world, as terrorists can use internet both as a virtual laboratory or training camp, and/or as a sort of ‘advertising space’ to spread their narratives and promote radicalization (Nuraniyah, 2014). Although there has been evidence of online materials that provided sort of real eLearning courses on how to engage in violent actions – such as video tutorials to prepare explosives – it is generally acknowledged that the internet will not replace real-world training experiences (Nuraniyah, 2014). The use of the internet as a propaganda tool, instead, is a much more widespread – and probably more significant – problem, as it allows extremists to reach large audiences at unprecedented scale.

There are commonalities in the online behaviors of different extremist groups. They tend to disseminate high volumes of materials and to use a wide range of multimedia tools. They increasingly leverage on few charismatic individuals, who have the skills and power to appeal to the young computer-savvy generations, through their professionally-produced compelling stories (Briggs & Feve, 2014). In addition to using dedicated platforms – such as blogs and forums – and specific websites, extremists are becoming increasingly

confident with mainstream social media platforms (Briggs & Feve, 2014). While ‘traditional’ online media, like websites and blogs, allow to reach mainly a sort of ‘committed self-selected audience’, who is actively searching for extremist contents, with social media it is easier to reach also people who are not committed to the cause, and thus to recruit vulnerable subjects (Briggs & Feve, 2013).

CVE online measures have initially focused on the implementation of policies aimed at limiting the amount of extremists’ information online, and at restricting their reach. These strategies are undoubtedly important, as governments need to enforce the law also in the online space, but there is consensus on the fact that, especially due to the size of the Internet – the amount and speed with which contents are uploaded – this approach is often impracticable. Therefore, to successfully counter extremism online, there is a need to move from a restrictive to a proactive approach, which attempts to reduce the appeal of extremists’ contents and thus the demand for it, by offering valuable alternatives to sensitive audiences (Briggs & Feve, 2013).

*Restrictive measures* (often defined as negative) are aimed at limiting the access to online contents produced by violent extremists. Positive or *proactive approaches*, instead, are those that try to reduce the demand for extremists’ contents, by undermining their appeal. Briggs & Feve (2013) list three main types of activities comprised within the so-called “Counter-Messaging Spectrum”, i.e.: government strategic communications, alternative narratives and counter narratives. Concerning *alternative narratives*, they focus on the aspect of ‘what we are for’ instead of ‘what we are against’, generally emphasizing shared positive values (p. 6). They “do not tend to challenge extremist messaging directly, but instead attempt to influence those who might be sympathetic towards (but not actively supportive of) extremist causes, or help to unite the silent majority against extremism by emphasizing solidarity, common causes and shared values” (Briggs & Feve, 2013, p. 12).

Being CVE a relatively young area of public policy, there is still much to improve (Briggs & Feve, 2013). In particular, the number of case studies is still limited, and there is not a clear understanding of which are the success factors for a CVE intervention. However, the evaluation of CVE programs’ effectiveness can be particularly challenging when these are of a preventive nature, as their success is represented by a ‘non-event’, which is much harder to measure than a real change (e.g. the fact that someone has not been radicalized or recruited by extremist groups) (Schmid, 2014).

### **ICTs and Heritage Preservation**

Given the serious concern for the future of many cultural sites, several researches and projects have been designed and implemented, to exploit the potential of new technologies to the service of heritage conservation. For instance, the Antiquities Coalition has created an interactive map to keep track of extremists’ attacks to heritage properties, and thus to discover patterns in their destructive activity and even to predict the locations and timing of future attacks (Sorrel, 2016). Many activities leverage on the use of 3D-laser scanning, such as the project of the NGO CyArk, which aims to collect high-resolution 3D scans of major sites and monuments around the world, which are at risk of destruction. This would allow people to virtually explore such structures (for purposes such as education and research) and to digitally preserve heritage sites. Similarly, heritage can be digitalized not only for conservation purposes, but also to be rebuilt in real life: that is what happened with the reconstruction of Palmyra’s destroyed Arch of Triumph in London, thanks to 3D modeling tools and visual documentation of the original building (Sayer, 2016). Rebuilding can be a way to recover what has been erased, and – most importantly – to show extremists that they will not manage to destroy the values that those buildings actually symbolized and what they truly meant.

Another use of ICTs for the sake of heritage preservation, is that of sensitizing people about the value of heritage and for calling them to take action against its destruction. Social media, in particular, are increasingly being used for conveying messages of social interventions.

### **Social Media Use for Social Purposes**

Social media channels provide opportunities to non-profit organizations and promoters of social causes of mobilizing social movements and activating specific segments of the public, making them aware of social

problems or engaging them in promoted behaviors (Peak et al., 2013). They are largely employed for social interventions in the field of health (Gordon et al., 2016), and can effectively be used for educational purposes, especially when teaching to new generations of ‘digital natives’” (Isacsson & Gretzel, 2011, p. 81). In particular, social media can play an important role as *edutainment tools* within new teaching approaches, that is as “a form of entertainment designed to educate as well as to amuse” (Isacsson & Gretzel, 2011, p. 82).

The use of social media channels for conveying social communications can bring about a series of important benefits. First of all, social media allow spreading messages to relatively large audiences with limited budgets. Then, they offer refined segmentation methods, and they allow selecting the interested audience, based not only on demographic data released by their users, but also on their online behavior and preferences. Furthermore, they allow gathering small groups together, regardless of their geographical location, and they help to track and evaluate the dissemination and effectiveness of campaigns (Bazzo et al., 2016). Additional benefits derive from their positioning between mass media and interpersonal communication. Indeed, if mass media communications are generally regarded as useful for raising awareness and spreading knowledge, interpersonal communication channels work well to initiate people to attitude and behavioral change (Kammer et al., 2016). Thanks to their multifaceted nature, social media fulfill both functions, reaching large audiences and at the same time interacting directly with audience’s members, thus allowing campaign organizers to economize and better achieve their goals.

## Research Design

The initiative ‘#faces4heritage’ falls within the vast array of initiatives of CVE. It was conceived in autumn 2015 in the frame of the activities of the *UNESCO Chair in ICT develop and promote sustainable tourism in World Heritage Sites*, based at USI – Università della Svizzera italiana, Lugano, Switzerland. Its overarching goal is the promotion of peace through heritage preservation. The underlying idea is that the protection and preservation of heritage is essential to foster mutual understanding, promote culture and thus, to create durable peace, which goes in the opposite direction with respect to the idea of extremists’ ‘cultural cleansing’. A social media campaign was designed and implemented, aimed at promoting knowledge about endangered WHSs. Also a personal call for action is done: driven by the belief that ‘Who destroys the past, has no future!’, people are called to stand up against violence by putting one’s face against heritage destruction. The motto of the campaign – ‘Yes, with my face’ – asks, in fact, people to personally commit themselves, by changing their profile picture on social media, using an application created on purpose, which facilitates the combination of the half of a user’s face with that of a damaged statue.

‘#faces4heritage’ developed an alternative narrative to contrast extremists’ messaging and actions. Messages do not directly attack extremist groups by undermining their activities and thoughts, but rather they try to present the negative consequences of their actions (through different materials, such as articles, research, visual contents) and to convey alternative points of view, stressing the universal value of heritage and the need to preserve it for future generations.

‘#faces4heritage’ supports – and falls within the umbrella of – the campaign *#Unite4Heritage*, a global initiative launched by UNESCO in 2015 in response to ISIL’s attacks on heritage, to promote and protect the world’s cultural heritage diversity. ‘#faces4heritage’ is featured on ‘#Unite4Heritage’ website and vice versa; moreover, on the Wikipedia page ‘Unite4Heritage’, a description and a link to the website of ‘#faces4heritage’ are featured.

‘#faces4heritage’ campaign has been conducted through different channels. First, a dedicated website has been created ([www.faces4heritage.org](http://www.faces4heritage.org)), within the UNESCO Chair website, so to exploit the already existing traffic of users; in the website, the project and its aims are presented, the tool for changing profile picture is provided, some damaged heritage sites are shown. Second, a dedicated Facebook page has been created, as this platform represents one of the most used social media worldwide, that allows creating campaigns and targeted ads, to be sponsored with a monetary budget. Finally, a Twitter account has been opened and is still active (contrary to the FB page), which is used to publish short contents with high frequency, thus allowing for constant updates. While Facebook was intended to reach personal accounts and users, Twitter was believed to be optimal for searching endorsement from institutional actors and organizations.

The campaign addresses three main audiences. First, the large ‘uncommitted population’, made up of all the people who might have heard about the issue of heritage destruction, but are still uncommitted about it. The goal is to make them aware of the problem and to urge them to become active. Second, tourists and tourism professionals are addressed: tourists, to let them become aware of the problem, of the universal value of cultural heritage, as well as of the actions that can be done to contrast this situation; tourism professionals, to push them to become more active in denouncing heritage violation and in promoting preservation. Lastly, the campaign aims to attract the attention of heritage professionals, to support their actions and to create valuable networks of relevant actors.

The type of messages published on Facebook and Twitter were tailored according to the characteristics of the channel and the intended audiences. On Facebook, posts reporting five types of messages were published, as described in Table 1. In Figure 1, some examples of Facebook post types are shown.

Table 1. Types of messages published on Faces4Heritage Facebook page

Type of message	Number of posts
Present and promote the campaign, to attract new followers and keep the existing ones updated	39
Inform about heritage-related topics, spread knowledge and awareness of heritage destruction	59
Inform about the involvement and commitment of relevant actors in the fight against Violent Extremism	18
Educate (share academic/educative contents)	6
Show support to cities hit by terrorist attacks	5
<b>Total</b>	<b>127</b>



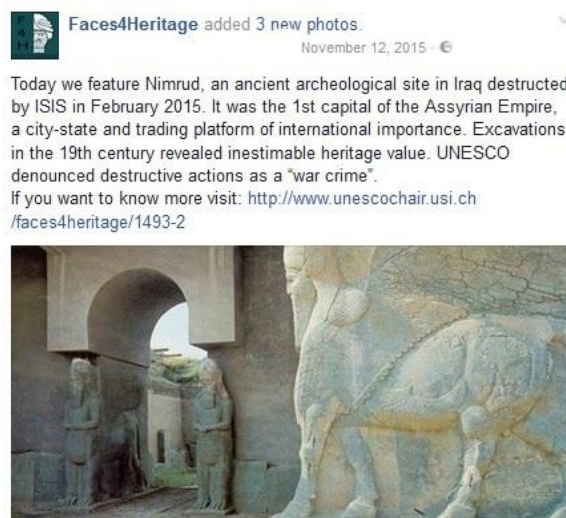
Present and promote the campaign



Present and promote the campaign



Inform about involvement and commitment of relevant actors



Inform on heritage-related topics, spread knowledge & awareness

Figure 1. Examples of types of messages published on Faces4Heritage Facebook page

Tweets, instead, consisted almost entirely in sharing news and links, retweeting other relevant users' contents and showing endorsement of relevant actors (some examples are shown in Figure 2).



Figure 2. Examples of messages published on Faces4Heritage Twitter account.

'#faces4heritage' has turned out into an international success, leading the campaign's creators in February 2016, to win the third place among 45 universities around the world in the competition 'Peer to Peer: Challenging Extremism (P2P)', a program sponsored by the U.S. Department of Homeland Security and Facebook Inc. that involves university students to develop and execute CVE initiatives and social media campaigns. The program is coordinated by EDventure Partners, a consulting agency managing innovative experiential learning programs. The campaign has been endorsed by the uncommitted population, as well as by relevant actors active in the sectors of heritage, tourism, academia, as well as governmental actors (see authors of Twitter posts shown in Figure 2). It has received wide media coverage, being featured by local newspapers and radios, as well as on worldwide-used information platforms such as Wikipedia and the UNESCO website.

On Facebook, the campaign ran for one full year, from October 2015 to October 2016, while on Twitter it is still active to date (March 2017) since its beginning in October 2015.

## Results and Discussion

For assessing the success of a social media intervention, it is crucial to choose the appropriate metrics to measure at best what each social medium can offer to the public (Praude & Skulme, 2015). Since users may have different goals when interacting with a social media channel – from simply searching information to clear purchasing intentions –, metrics should be chosen according to the type of interaction that one intends to evaluate. In social campaigns, some metrics can be more valuable than others depending on what stage of change it is wished to evaluate: if the increase in awareness on an issue, a change of attitude, a change in individual behavior, or the diffusion of a desired behavior in the society (Luca & Suggs, 2010). In what follows, the performances of #faces4heritage on Facebook and on Twitter are presented, using a combination of metrics.



## #faces4heritage on Facebook

The literature is scarce regarding Facebook metrics for social purposes, therefore, corporate Facebook metrics have been considered and adapted for the initiative presented here. Bonsón and Ratkai (2013) propose three macro-metrics to evaluate stakeholders' engagement, i.e.: popularity, commitment and 'virality', which can be easily calculated using public quantitative information offered by Facebook. In addition, some of the metrics provided by Facebook analytical tool *Facebook Insights* have been taken into consideration, in particular: number of page likes, post reach, reactions, comments and shares, post clicks, video views.

Over its period of activity (October 2015 – October 2016), the FB page '#faces4heritage' has collected over 3'000 *page likes*. The growth in page likes has been substantial and rapid during the first months of the campaign, reaching a level of around 2'700 likes at the end of December 2015. After this moment, page likes have grown at a much lower speed, gathering around 50 new likes per month in the period January – May 2016 (see Figure 3). The reason is that the FB page was mostly used to launch the campaign and establish the 'brand'; the competition P2P to which '#faces4heritage' participated, then, ran from October to December 2015, thus the promotion was very intense in that period.



Figure 3. Trends of Total Page Likes of the Facebook page 'Faces4Heritage'. Source: *Facebook Insights*

*Post reach* represents the number of people that have been displayed a certain post on their Facebook wall. Post reach increases exponentially when posts are sponsored, because Facebook algorithm gives them precedence over organic posts. A total of 127 posts were published in the considered period. Figure 4 shows the trend of post reach of #faces4heritage in the concerned period: the first six posts of the campaign reached a considerable higher number of people because they were sponsored.

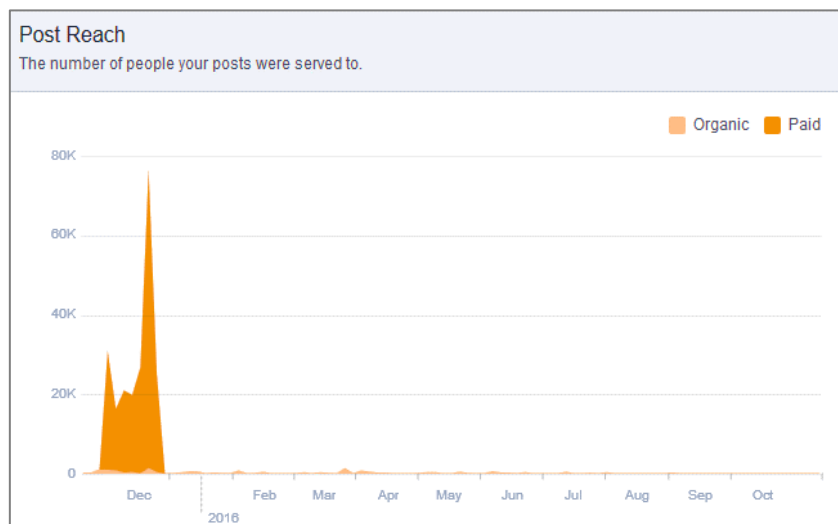


Figure 4. Trends of Post Reach of '#faces4heritage' Facebook posts. Source: *Facebook Insights*



*Single post coverage* tells how many people have seen a specific post over time. This metric is also significantly influenced by sponsoring activities: the top three ‘most covered’ posts were all sponsored and reached numbers of users as high as 7,000 – 17, 000, compared to the average posts’ coverage of 800 people reached per post.

*Reactions* comprise different ways in which people can express their interest and opinion about the contents published on Facebook. They represent an important indicator of stakeholders’ engagement. This metric is directly influenced by users’ behaviors, and influences in turn the coverage and reach of a post, since the more people see and interact with a content, the more this content will appear to their network of friends, and the broader the audience reached will be. Out of 2’588 total reactions to the campaign, only 21 were reactions different from likes (new types of reactions have been introduced in Facebook in addition to the ‘like’ since February 2016, i.e.: love, haha, wow, sad, angry).

Table 2 reports values for the metrics popularity, commitment and virality calculated on total reactions, comments and shares (that is direct reactions/comments/shares plus reactions/comments/shares on other reactions/comments/shares), while Table 3 reports values for the same metrics but calculated on reactions, comments and shares on posts (that is only direct reactions/comments/shares). Regarding *popularity*, values are very similar if calculated based on total reactions (100%) and if calculated based on reactions on posts (99%), since only one post has received no direct reactions. *Commitment* and *virality* instead, result quite different if looked from the perspective of total comments and shares (Table 2), or considering just the comments and shares on posts (Table 3). Indeed, shares have generated a significant number of comments and other shares, in addition to those operated by users directly on posts. This is also evident from the fact that the total number of comments is 50, and only 29 of these have been left directly on posts (while the remaining 21 have been gathered through shares), as it happened for the 238 shares, of which only 145 were done directly from the original posts (while the others were done from other shares). These are the reasons why higher levels of commitment and ‘virality’ are recorded when calculated on total values.

Table 2: Measures of '#faces4heritage' stakeholders' engagement on Facebook, calculated based on total reactions, comments and shares. Adapted from *Bonsón & Ratkai (2013)*.

<b>Popularity, Commitment, Virality calculated based on total reactions, comments and shares</b>			
	<b>Measure</b>	<b>Formula</b>	<b>Result</b>
<b>Popularity</b>	P1: Percentage of the total posts that have been liked <sup>1</sup>	Number of posts with reactions (127) / Total posts (127)	100%
	P2: Average number of likes per post	Total reactions (2’588) / Number of posts (127)	20,4
<b>Commitment</b>	C1: Percentage of the total posts that have been commented on	Number of posts with comments (29) / Total posts (127)	23%
	C2: Average number of comments per post	Total comments (50) / Total posts (127)	0,4
<b>Virality</b>	V1: Percentage of the total posts that have been shared	Number of posts with shares (68) / Total posts (127)	54%
	V2: Average number of shares per post	Total shares (238) / Total posts (127)	1,9

<sup>1</sup> Note: in Table 2 ‘likes’ and ‘liked’ refer to the whole spectrum of Facebook reactions (*likes, haha, love, angry, sad, wow*).

Table 3: Measures of '#faces4heritage' stakeholders' engagement on Facebook, calculated based on reactions, comments and shares on posts. Adapted from *Bonsón & Ratkai* (2013).

Popularity, Commitment, Virality calculated based on reactions, comments and shares on post			
	Measure	Formula	Result
Popularity	P1: Percentage of the total posts that have been directly liked <sup>2</sup>	Number of posts with direct reactions (126) / Total posts (127)	99%
	P2: Average number of direct likes per post	Total direct reactions (2'453) / Number of posts (127)	19,31
Commitment	C1: Percentage of the total posts that have been directly commented on	Number of posts with direct comments (21) / Total posts (127)	17%
	C2: Average number of direct comments per post	Total direct comments (29) / Total posts (127)	0,2
Virality	V1: Percentage of the total posts that have been directly shared	Number of posts with direct shares (45) / Total posts (127)	35%
	V2: Average number of direct shares per post	Total direct shares (145) / Total posts (127)	1,1

Moreover, the *profiles of users* who used the hashtag '#faces4heritage' have been analyzed, to understand if they corresponded to the desired campaign's audience. Both organizations and individuals can be identified. Organizations that showed commitment to '#faces4heritage' operate in diverse fields that are relevant to the scope of the campaign, such as tourism (e.g. MedTravel, Archeological Tourism Exchange), heritage and art sector (e.g. SAFE, Archeology in Yemen, Iraqesque), ICTs (e.g. DigitalMeetsCulture, Gnucoop), media (Advertiser Magazine, Giornale del Popolo), as well as political and economic actors (e.g. U.S: Embassy in Bern, ASEAN World Heritage). Among individuals, some of them are part of the 'uncommitted population', while others are representative of the tourism industry (such as IFITT members, consultants for territorial development, tour guides, etc.), or work in ICT and in heritage field, and some of them are members of the academia.

### #faces4heritage on Twitter

The account 'Faces4Heritage' has been very active on Twitter since its creation in October 2015, and it still posts almost daily updates about topics addressed by the campaign. Due to the high number of Tweets (over 1'000 until February 2017), the present analysis takes into consideration only a specific period, i.e.: the year 2016 (January 1, 2016 – December 31, 2016).

The data presented come from a variety of sources. The analytics platform *Union Metrics* provided quantitative information about how the topic '#faces4heritage' has been used on Twitter: data on Tweets' and hashtags' potential reach, potential impressions, frequency, Tweets breakdown, engagement indicators such as Retweets and replies, and contributors. The topic tracker provided by Union Metrics, then, allowed comparing the performances of the two related topics '#faces4heritage' and '#Unite4Heritage'. Finally, the internal analytical service of Twitter – similar to Facebook Insights – provided data on the actual impressions reached by Tweets. The comparison and union of the data retrieved from these different sources has allowed making important considerations and drawing conclusions on the performance of the entire Twitter campaign. Indeed, while Union Metrics' calculations are based on *potential impressions* – and, thus, they give an indication of the potential audience of Tweets –, Twitter internal analytics provide data on the *actual impressions*: the ration between these measures allows understanding the overall effectiveness of the campaign, and knowing whether the Tweets have generated satisfactory levels of engagement, compared to what they could have achieved in potential terms. However, this comparison is limited to the Tweets

<sup>2</sup> Note: in Table 3 'likes' and 'liked' refers to the whole spectrum of Facebook reactions (*likes, haha, love, angry, sad, wow*).

published by Faces4Heritage’s own Twitter account (@Faces4Heritage), and not to all the Tweets on the topic published by contributors, because Twitter internal analytical tool provides these confidential data to account managers only relative to their own profile’s performances.

‘Faces4Heritage’ Twitter account is currently *followed* by more than 1’300 Twitter users, while it follows over 1’100 profiles. ‘Faces4Heritage’ has published a total of over 1,000 Tweets (including regular Tweets and Retweets) and has liked over 2’000 contents (as to February 2017).

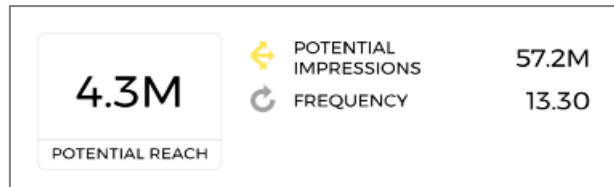


Figure 5. Data about Potential Reach, Potential Impressions and Frequency of Twitter posts referred to the topic ‘#faces4heritage’ in the year 2016. Source: Union Metrics

Figure 5 shows the potential reach of the Twitter topic ‘faces4heritage’, which is estimated by Union Metrics at 4.3 million. Union Metrics considers *reach* as the total number of estimated unique Twitter users that have been delivered the Tweets containing the concerned term. While reach is a measure based on concept of unique users, impressions are non-unique: the number of potential *impressions* generated (also called ‘exposure’) is defined as the “total number of times tweets about the search term were delivered to Twitter streams” (Union Metrics, 2016, January 23). *Frequency*, instead, is the number of potential impressions delivered per each unique receiver. Union Metrics calculates measures in terms of ‘possible viewers’, that is how many timelines a Tweet could have appeared in, assuming that every user the Tweet was displayed to would be active at that specific moment, and would not just scroll quickly the feed. These measures, though, gain value when compared to actual data, to check how a Twitter account or topic is performing compared to what it could theoretically achieve.

While reach and exposure are calculated in theoretical terms, the data about the number of Tweets and their typologies are objective. In 2016, a total of 5’566 Tweets talked about ‘#faces4heritage’: among them, 1’143 were Regular Tweets, 4’297 were Retweets and 126 were Replies, as it can be seen from Figure 6. Twitter users generally use the *Retweet function* to share information in which they are interested, or which they consider pertinent with the concerned cause or business goal. Retweeting, then, is a good way of interacting with stakeholders and expressing involvement with them. Retweets, together with likes and mentions (which include replies) represent important indicators of engagement, comparable to reactions, comments and shares in the case of Facebook.

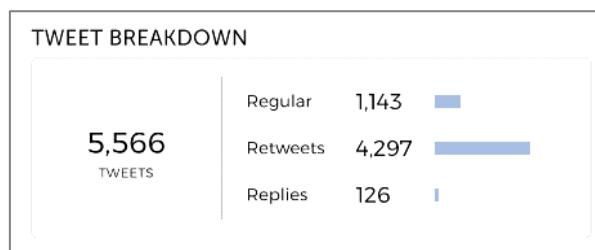


Figure 6. Data about types of Tweets concerning the topic ‘faces4heritage’ on Twitter in the year 2016. Source: Union Metrics

As for the number of *contributors* to the topic, that is the number of unique people who have tweeted about the topic either by mentioning it, replying to it or retweeting, it amounts at 1’572 unique users in 2016 (see Figure 7). According to Union Metrics’ data, each of these contributors has contributed in the measure of 3,5 Tweets, and their average amount of followers is over 4,000. However, the average can be considered an approximate indicator, as it is highly influenced by outliers. Indeed, among ‘#faces4heritage’ contributors, it

is possible to find a great variety in the amount of followers: many top contributors have extremely high numbers of followers (e.g. UNESCO – '@UNESCO' – has over one million followers), while some users, which rarely tweeted about the topic have 0 (or close to 0) followers, but are anyhow counted in the average calculation.

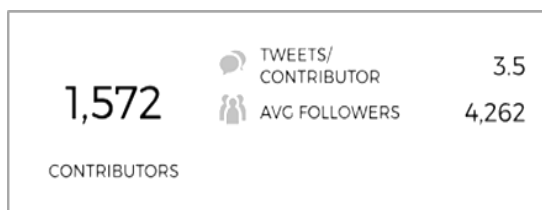


Figure 7. Data about 'Contributors' to the topic 'faces4heritage' on Twitter in the year 2016.  
Source: Union Metrics

These general data about the performances of 'faces4heritage' on Twitter in the selected period can be more fully understood and contextualized through the *comparison* with the overarching topic 'Unite4Heritage'. Table 4 exposes the comparison of the metrics proposed so far for 'faces4heritage' and 'Unite4Heritage', to have an idea on how these two campaigns have been embraced by the public.

Table 4. Comparison of performances of the topics 'faces4heritage' and 'Unite4Heritage' on Twitter in the year 2016.

	#faces4heritage	#Unite4Heritage	Ration
Potential Reach	4,3M	34,6M	12%
Potential Impressions	57,2M	547,8M	10%
Total Tweets	5'566	32'100	17%
Regular Tweets	1'143	5'029	23%
Retweets	4'297	26'600	16%
Replies	126	471	27%
Contributors	1'572	14'900	11%
Tweets/contributor	3,5	2,2	159%
Average Followers	4'262	4'729	90%
Average Tweets/Week	105	605,8	17%
Potential Impressions/Tweet	10'300	17'100	60%
Potential Impressions/Week	1,1M	10,3M	11%
Retweet Rate	3,4	4,8	71%

The comparison between the topics '#faces4heritage' and '#Unite4Heritage' is at the level of Twitter topics and not of Twitter accounts: indeed, the specific account 'Unite4Heritage' ('@Unite4Heritage') was introduced only one year after that of 'Faces4Heritage', in October 2016. The two accounts, then, are not

comparable in terms of number of Tweets and followers (to February 2017, 'Unite4Heritage' has only around 400 followers and has published around 250 Tweets, compared to the almost 1'300 followers and over 1'000 Tweets of 'Faces4Heritage').

Since #Unite4Heritage was launched directly by UNESCO, it has received a global media coverage and has been supported by the most important international players in the concerned fields. As Table 4 shows, the performances of '#faces4heritage' are clearly inferior to those of '#Unite4Heritage', but at the same time they represent an interesting proportion of the overarching benchmarked campaign's results, which – considering the different scale of the two initiatives – allows acknowledging the international success of '#faces4heritage'.

For the majority of reported metrics, '#faces4heritage' performances corresponded to around 10-20% of those of '#Unite4Heritage'. In particular, potential reach and impressions of Tweets about 'faces4heritage' corresponded respectively to 12% and 10% of those of 'Unite4Heritage', while the amount of total Tweets about 'faces4heritage' topic is equal to the 17% of the total of those concerning 'Unite4Heritage'. As far as contributors are concerned, users who contributed to spreading the 'faces4heritage' topic in 2016 were around 11% with respect to those that tweeted about 'Unite4Heritage'. However, it seems that the contributors of '#faces4heritage' were more active, as the relation 'Tweets/contributor' is higher than in the case of '#Unite4Heritage' (3,5 Tweets per contributor, with respect to 2,2). Moreover, the average number of followers per contributor is almost identical in the case of the two campaigns.

All the 25 top Tweets concerning 'faces4heritage' gained approximately 10% of the impressions obtained by the top ones dedicated to 'Unite4Heritage', showing a certain consistency in the proportion of the two campaigns' performances. Among their top 25 Tweets in terms of impressions, the two topics have one contributor in common, i.e.: UNESCO ('@UNESCO') (the Tweet is represented in Figure 2).

The *most retweeted Tweets* about 'faces4heritage' addressed – in order – the topics of: heritage destruction, the use of technologies for heritage preservation and reconstruction, attempts and successful episodes of heritage preservation, looting, cultural terrorism and UNESCO's initiatives.

## Conclusions

ICTs, and particularly social media, constitute nowadays one of the main channels that terrorist groups use to spread their extreme ideologies and recruit fighters. Making a strategic use of such tools to counter violent extremism is, thus, an urgent necessity, which needs to be answered with a systematic yet focused effort. In the paper, one of these answers has been presented, which consisted of a campaign through social media aimed at raising awareness about the intentional destruction of heritage by terrorist groups. The analysis of the campaign's performance on Facebook and Twitter has shown that #faces4heritage has been – and still is – an important initiative that effectively supports the UNESCO sponsored campaign #Unite4Heritage. By showing evidence of the problem of heritage destruction and ways to countering it, it has allowed different publics to get involved in it, from raising the low awareness of the uncommitted population, to supporting relevant actors, actively committed in the fight against violent extremism.

Results of the campaign's performance on social media not only provide a vivid representation of the role that ICTs can play to raise awareness on an issue of utmost importance, but they provide also a theoretical contribution in understanding how online messages should be designed to have an impact on intended audiences. Following are some advices that practitioners in the concerned fields might get, to successfully plan and execute social media campaigns in the domain of heritage preservation and promotion:

- regarding the *messages* to promote: to elaborate alternative narratives in conjunction with counter narratives, which means to present the situation at stake objectively providing data and showing facts rather than just criticizing it, to provide alternative interpretations based on positive and desirable values, to propose solutions and make call for actions;
- regarding the *communication strategies* used to elaborate messages: to conceive posts with a strong visual impact, since they have higher chances to be noticed and remembered;

- as for the *channels/media* used to send messages: to choose them according to the public one intends to reach and to the type of messages to be promoted. In the case of #faces4heritage, Facebook allowed to reach members of the ‘uncommitted population’, since it works well on a personal profile level, while Twitter allowed reaching organizations and individual actors operating in the relevant sectors;
- as for *campaigns on Facebook*, specifically: to encourage Facebook followers to share the campaign’s contents as much as possible, as this action gives the possibility to noticeably increase the visibility of a page and the engagement of the public. The case of #faces4heritage showed, in fact, that shares’ might have a viral effect, since almost half of the comments and shares recorded by the campaign were left on shares and not directly on the FB page of the campaign;
- as for *campaigns on Twitter*, specifically: to leverage on the network of relevant actors to maximize posts reach, by mentioning them and retweeting (relevant) news posted by them.

In addition, social media campaigns like #faces4heritage constitute a concrete contribution to the fight against the black market of antiquities. In fact, disclosing the problem and diffusing images of looted antiquities, art collectors can be warned about the black market and its consequences and pay attention to artifacts they get in touch with.

Finally, denouncing the violent destruction of heritage is a way to solicit tourists to have a more conscious behavior, respectful of past cultures, present people and future generations.

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# Hybridizing Cultural Heritage with Creativity: an Emerging Narrative in Italy

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Research Note

**Keywords:** culture-led regeneration; hybridization; creativity; stakeholder engagement; narratives.

## Abstract

Culture-led regeneration may occur in continuity with cultural legacy or by injecting creativity into urban contexts. Four cultural regeneration models have been identified by combining stakeholder engagement in urban decision making and the hybridization of cultural heritage with creativity. The models of *managerial innovation* and *socio-cultural innovation* have been used to interpret two Italian best practice. In the IlCartastorie Museum in Naples (Campania region), heritage hybridization drives managerial innovation by leveraging on managerial competences, digital storytelling and artists. The low level of stakeholder participation does not activate a wider urban regeneration. In Favara's Farm Cultural Park (Sicily region) the hybridization of local heritage with creativity brought by artists coming from different countries is combined with local stakeholder participation in the socio-cultural innovation of the town. This wide transformation has positioned Favara on the global map as a creative place.

## Introduction

Most academics and policy makers recognize that places and/or cities should capitalize on their cultural legacy to activate sustainable culture-led regeneration processes (CSES, 2010; Sacco, Ferilli, & Tavano Blessi, 2014; Della Lucia & Franch, 2014; UNCTAD, 2015). Cultural and creative tourism in cities is considered to be one of the most important creators and captors of value through such regeneration processes. It builds on the narratives that arise out of them (Bellini & Pasquinelli, 2017). The question of which drivers might be most effective to foster and manage culture-led urban regeneration has not yet been fully answered. For many cities the term remains an empty buzzword (Evans, 2001; Vanolo, 2013; Tang, 2016).

This paper draws on the most recent literature and empirical analysis on culture-led urban regeneration. It uses an exploratory conceptual framework of urban cultural regeneration models (Della Lucia et al., 2017) to identify the drivers of urban regeneration and the narratives emerging from regeneration in two Italian cases.

## Theoretical Background

Regeneration has been defined as the transformation of a place that has shown symptoms of intrinsic marginalization (environmental, social and/or economic), or whose previous development models are in crisis (Langen & García, 2009; Plaza & Haarich, 2010; Richards, 2014). Culture-led regeneration occurs when culture, often with a high public profile, drives the requalification of urban areas, the development of infrastructure and services, the animation of places with new attractions and the attraction of investment, human resource and visitor flows.

This widespread transformation may occur in continuity with the past or be marked by profound changes (Della Lucia & Franch, 2014; Della Lucia et al., 2016). Capturing value through their tangible and intangible cultural heritage – both artistic-cultural and professional-productive (Hall, 2004) – allows cities to maintain a strong link with an authentic sense of place. On the other hand, growing inter-urban competition in a globalizing world is forcing cities to be creative, flexible in targeting markets and effective innovators of their

image (Trueman, Cook, & Cornelius, 2008; Zenker, 2009). Iconic buildings, events and a number of consumption-led and experience-based cultural and creative activities are currently among the main catalysts serving these purposes (Hall, 1994; Getz, 2008). Their development may entail the risk of serial reproduction and the loss of a city’s authenticity (Smith, 2007).

Achieving a balance between tradition and innovation is crucial for sustainable and successful culture-led urban regeneration (Della Lucia & Franch, 2014). The city remains faithful to its cultural heritage, while injecting creativity into traditional urban models of place development, business and entrepreneurship. This balance also affects which narratives put cities enduringly on the global map as places to live and visit (Govers & Go, 2009). A diverse combination of place-specific conditions (politic, economic, cultural, social) affect whether and how a balance is achieved (Currid, 2007; Richards & Palmer, 2010). The engagement of diverse stakeholders in participatory and inclusive urban decision making is crucial to make regeneration sustainable (Go & Trunfio, 2014; Go et al., 2013) as it is the hybridization of cultural heritage with creativity which originates in local socio-cultural contexts (Cooke & Lazzeretti, 2008), talent (Florida, 2002), cultural and creative industries (Hall, 2000). A conceptual framework has combined these dimensions into a matrix which identifies four urban cultural regeneration models (patronage, social innovation, managerial innovation and socio-cultural innovation) and related forms of urban tourism (Della Lucia et al., 2017). The high level of stakeholder engagement and hybridization of cultural heritage with creativity direct urban regeneration paths toward socio-cultural innovation.

**Case Study and Research Methodology**

A multiple-case study (Yin, 2014) has been used to provide and compare preliminary insights into the drivers of urban cultural regeneration and the narratives emerging from regeneration. They are complex and relatively unexplored phenomena (Creswell, 2007). Both the methodological choice of cases and the issues investigated draw on appropriate sources of case study methodology (Yin, 2014; Xiao & Smith, 2006; Baxter & Jack, 2008). The cases entail two examples of Italian best practice in urban tourism and cultural regeneration. The IlCartastorie Museum is a successful attraction in Naples (Campania region). The Farm Cultural Park was successful in Favara’s transformation (Sicily region).

*The research design* draws on two models (Figure 1) – managerial innovation and socio-cultural innovation – of the conceptual framework of urban cultural regeneration (Della Lucia et al., 2017). These present a high level of cultural legacy hybridization with creativity, but a low level of stakeholder engagement in the case of managerial innovation and high in the case of socio-cultural innovation. These models can be used effectively in both cases to study the drivers of urban cultural regeneration and the narratives that emerge from this regeneration. Cities can use these narratives to position, or reposition, themselves.

<b>Managerial innovation</b>	<b>Socio-cultural innovation</b>	High
<b>Patronage</b>	<b>Social innovation</b>	Heritage hybridization
Low	Stakeholder engagement	High

Figure 1. Urban cultural regeneration models  
 Source: Adaptation on Della Lucia et al., 2017, p. 183

Drivers and related narratives are defined as follows:

- *Stakeholder engagement* is a driver of both social innovation and heritage hybridization. When stakeholder engagement is low, a single actor plays a primary or exclusive role in preserving heritage and in maintaining the traditional place identity/narrative. In contrast, diverse stakeholders (private/public, internal/external) participate and add value to heritage (*high stakeholder engagement*). They activate both intangible innovations manifest in social practice (social innovation) and/or heritage cross-fertilization with new forms of creativity reshaping symbolic values, identity and narratives.
- *Heritage hybridization with creativity* is a driver of managerial and socio-cultural innovation. When it is low, continuity with the past/cultural legacy prevails and is displayed in heritage preservation and/or value creation through traditional narratives. When the past meets contemporary creativity, it enables the cross-fertilization of cultural legacy (*high heritage hybridization*) New ways of thinking, living and being are used to define new tourist experiences and communicate place development, business and entrepreneurship.

The collection of case evidences was carried out in March-May 2017 through desk analyses of official documents, strategic plans and web sites, and semi-structured interviews with primary stakeholders.

### **The IICartastorie Museum as a Model of Managerial Innovation**

The Historical Archive of the Banco di Napoli Foundation is the most important historical bank archive in the world. Dating back to the second half of the 1500s, it preserves several centuries of documents related to the activities of the ancient public banks of the city.

In 2016 the Banco di Napoli Foundation turned the Historical Archives into the IICartastorie Museum (<http://www.ilcartastorie.it/en/>) (Minguzzi & Riolo, 2016) by leveraging on intangible assets: managerial competences, ICTs and digital storytelling. Interweaving historical documents and present day creativity, the Foundation uses digital storytelling to provide visitors with an experience of important Neapolitan historical moments and celebrities, contained in the Archives' volumes and *polizze* (orders of payment), rather than mounting an exhibition of this material cultural legacy. Examples of this experience included are Caravaggio's masterpieces in Naples, the plague of 1656, the intuitions and torments of the Prince of Sansevero and a number of stories about both Neapolitans and foreigners. Voices, digital images and stories create unique emotional and immersive experiences connected to the history of Naples. The hybridization of cultural legacy in the IICartastorie Museum is also enlivened through the hosting of international contemporary artists. An experimental project, published on the website, involves the communication of stories in contemporary language (i.e. social media language), in an attempt to involve external stakeholders in the building of new narratives of the Museum.

The transformation of the Historical Archives into the IICartastorie Museum is an example of *managerial innovation*. The hybridization of cultural heritage with contemporary creativity in diverse forms of art and digital applications has also transformed the image of the Historical Archives and will – it is hoped – affect its visitor targets. However, due to the low level of urban stakeholder engagement, this case is not a model of urban cultural regeneration. Dialogue, and shared projects with urban stakeholders, are still needed to move towards a form of regeneration which can generate widespread innovation and wellbeing.

### **Farm Cultural Park in Favara as a Model of Socio-Cultural Innovation**

Favara (pop. 32,529) is a municipality in the Sicilian province of Agrigento. Until 2010 it was a marginal area economically, and socially very conservative: agriculture and mining – its primary industries – were in decline, tourism had not been developed, the population was dwindling, and the heart of the town was run-down and semi-abandoned.

Farm Cultural Park (<http://www.farmculturalpark.com/EN/index.html>) is a cultural project created in 2010 and funded by Andrea Bartoli, a notary who lives with his family in Favara. His goal was to increase the social

wellbeing of Favara as a first step in the design of a new future for the town. Heritage conservation and hybridization with creativity were the first levers used for this purpose. Old run-down buildings in the town center were first restored and then transformed into a modern Cultural Center which integrates tradition and creativity, social areas (gardens, social kitchens, and more) and exhibition spaces. Young artists from around the world have been hosted in the Center in return for injecting creativity into the local atmosphere – using the space as their studio, and then leaving the resultant artworks behind when they leave. In just a few years, the Center has become an important tourist attraction, hosting people interested in experiencing its identity and creative atmosphere: getting inspired, meeting locals, building social relations and enjoying authentic experiences. The social value of the project has inspired other members of the community both to participate into the project, now funded by hundreds of people, and to create their own businesses, mostly connected to tourism-related facilities (B&Bs, private accommodation, restaurants, etc.).

The culture-led regeneration of Favara is an example of *socio-cultural innovation* where both the engagement of stakeholders and heritage hybridization have been levered to rebuild social relations, foster social inclusion and generate social innovation. These, in turn, have resulted in a cultural and economic transformation, with improved living standards and services benefiting residents and attracting visitors interested in experiential/creative tourism. This regeneration process has given Favara a new identity, and a new narrative for the town, as a place where new ways of thinking, living and being can be created and/or experienced. A project promotes the Farm's values and philosophy through a unique format. It aims to inspire good practice in social utility and sustainable development and to create a network linking the places where Farm ambassadors live.

### Conclusions, Limits and Future Research

The conceptual framework of cultural regeneration models proved effective to identify the drivers of transformation in the cases examined (and their narratives). In the IlCartastorie Museum, heritage-creativity hybridization drives managerial innovation. It transformed a tangible cultural heritage into an intangible creative asset and repositioned the Historical Archives's image. This innovation remains isolated from the urban area as no other stakeholders have been included in the process. On the other hand, Favara's Farm Cultural Park levered on heritage hybridization to foster social innovation. In in turn, this activated social inclusion and economic value generation through creative tourism and new entrepreneurship. The new identity created through this process is allowing Favara to position itself on the global map and connecting it to other places with shared values.

Although these results are preliminary and exploratory, they have both theoretical and managerial value. The framework interpreting cultural regeneration models connects heritage-creativity hybridization and stakeholder engagement with the creation of narrative, image-making and brand building, and thus brings together diverse knowledge domains (Govers & Go, 2009).

From a managerial viewpoint, this framework invites policy makers and entrepreneurs to take up the challenge of showing that heritage cross-fertilization can drive extensive socio-cultural urban innovation and thus enhance urban sustainable development and well-being. The two dimensions of the matrix are drivers which can be used to manage and monitor urban transition to this goal. The benefits of this transition include: the emergence of strong symbolic meanings and a sense of community, capacity building, increased psychological and social wellbeing and empowering people to participate in change.

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**In Memoriam: Frank M. Go**

*Co-founder Heritage, Tourism and Hospitality, International Conference*

Frank M. Go was professor emeritus endowed professor of Event and Tourism Marketing in the Department of Marketing Management at Rotterdam School of Management/Erasmus University in the Netherlands. Previously, he held the Bewetour Chair of Tourism Marketing at the Rotterdam School of Management and served at the business faculties of universities in Toronto, Calgary in Canada and Hong Kong; as visiting professor at the George Washington University, USA, Leuven, Belgium, Open University Business School, UK, Rikkyo University, Japan.

# A Facebook Campaign About Heritage and Tourism: Its Results and How to Measure Them

*Caterina Della Monica, Silvia De Ascaniis, Stefano Tardini, Maria Garbelli and Lorenzo Cantoni*

*Full Paper*

**Keywords:** heritage tourism; social media; social media marketing; awareness raising; heritage awareness; behavioral outcomes.

## **Abstract**

While the role of ICTs both for tourism purposes and heritage promotion is widely acknowledged, the specific role that social media might have in influencing awareness about heritage-related issues and travel behaviors at heritage sites is still under-investigated.

In this paper a research is presented, conducted in a quasi-experimental setting, aimed at assessing a social media campaign. Goals of the campaign were to raise awareness about World Heritage Sites (WHSs), promote (informal) learning about them, and raise interest and willingness to visit them.

Students of two universities – in Switzerland and in Italy – have been surveyed in order to assess their knowledge about UNESCO inscribed WHSs in Switzerland and in the Italian Lombardy Region. The survey has also explored the students' interest in WHSs, as well as their travel intentions and behaviors when it comes to visit cultural destinations.

Then, a campaign has been launched on Facebook, presenting all the UNESCO-inscribed properties in the two selected areas. The campaign has been co-designed by a class of Bachelor students of one of the involved institutions, so to ensure a better understanding of the interests and styles of their peers.

Two months later, a post-campaign survey has been launched in order to measure how many students had been exposed to the campaign – both remembering it explicitly or being able to recognize it if presented with some of its messages. Moreover, the students' (informal) learning about the covered WHSs, their intention to visit them and their actual visits have been assessed.

Goal of this research was also to test if there is a relationship between an increased knowledge about the heritage sites of a region and an increased willingness to travel to such heritage sites.

The comparison of the two surveys' results has shown that the students' awareness about heritage sites in general, and Swiss and Lombard sites in particular, has increased after the campaign's implementation, while the intentions to visit and the actual visitation of the promoted sites seem not to have been influenced by the campaign.

This paper allows drawing suggestions for researchers and professionals working in the tourism field, especially for those dealing with cultural heritage and its promotion through digital technologies, as it allows understanding the potential of the constructive use of social media for sensitizing the youths towards heritage-related topics.

## **Introduction**

The concept of cultural heritage is complex and multifaceted and it has been the object of several researches in different fields. While some heritage sites and intangible cultural elements have a local value, which is restricted to the specific populations that have produced them, some natural and cultural manifestations are acknowledged to have a universal value and to be of interest for all the peoples of the world, irrespective of

their geographical location and origin. Starting from this concept of ‘world heritage’, the United Nations Educational, Scientific and Cultural Organization (UNESCO) established its famous ‘World Heritage List’ in 1972, with the goal of identifying the world heritages of outstanding universal value to humanity and of guaranteeing them the right protection and presentation, through local populations’ participation as well as international cooperation.

The relationship between heritage and tourism is straightforward, as the former constitutes the basis of cultural tourism, and many destinations leverage on their – recent or distant – past to attract visitors.

In today’s ever-changing world, keeping the connections with the past and understanding the global value of heritage sites and traditions becomes sometimes a difficult task. Neglecting it can have negative repercussions on cultural identity and cultural education.

In recent years, we have witnessed major changes and evolutions in the world of communications, in particular with the so-called Web 2.0: an evolution of the World Wide Web into a more dynamic system, which has allowed the emergence of new applications – e.g., social media systems – that permit high degrees of interaction by Internet users (Cantoni & Tardini, 2010). Social media have become key tools not only for private interpersonal communications, but also in the fields of institutional communication and online promotion, as it can be seen from the data about their global diffusion. For instance, as to June 2016, Twitter counted 313 million active users per month, among which 79% were located outside the United States (Twitter, n.d.), while Facebook reached its first billion users in August 2015 (Facebook, 2015).

The starting point to better understand the current research is exactly the relationship between heritage and the use of emerging digital communication technologies for business– in particular social media (the so called “social media marketing”).

The use of ICTs and social media for tourism purposes is not new, both in literature and in practice: as it has been pointed out, social media are based on ‘openness, connectedness and participation’ (Park & Oh, 2012) and play also an important role in promoting a sustainable approach to tourism (Ali & Frew, 2013). In recent years, several travel industry players have extended their communication towards the online world, and new platforms related to any kind of travel issues emerge every year (just think of Online Travel Agencies or Online Travel Reviews). However, the use of social media for the promotion of heritage – a relevant part of the tourism offer and of many tourists’ experiences – has not been investigated in depth: the research on the use and effectiveness of these tools in the specific heritage and tourism contexts is still scarce.

Therefore, the main question of the present research is about the effectiveness of social media as communication tools to sensitize the population towards the value of cultural heritage, with a specific focus on the segment of young generations. To do so, the design, implementation and results of a social media campaign promoting UNESCO World Heritage Sites (WHSs) in a quasi-experimental research-setting will be presented and discussed, aiming at contributing to fill the abovementioned research gap and to provide theoretical and practical suggestions to interested publics. In particular, the research addresses two main categories of stakeholders:

1. Researchers in the area of social media: this research can provide them with a methodological contribution to assess the effectiveness and impact of social media campaigns, as it presents the experience of the launch and implementation of a campaign and the strategies to measure its impact onto the awareness and behaviors of its stakeholders.
2. Professionals in the fields of heritage and tourism: this research provides them with insights about the level of knowledge of young people about local heritage, and draws their attention on the potential of a constructive use of social media in the context of heritage promotion and awareness raising.



## Literature Review

### Heritage and Tourism

Cultural heritage is one of the most important resources upon which the global tourism industry is based, and constitutes the main offer of many tourism destinations (Timothy, 2011). Because of its multifaceted nature, different scholars and institutions have proposed their definitions of “heritage”. Among the others, UNESCO defines it as “our legacy from the past, what we live with today, and what we pass on to future generations” (UNESCO, n.d.). The concept of heritage has certainly changed over time, and in particular it has expanded, becoming a more inclusive idea than in the past. Nowadays there seems to be an agreement that heritage can be both of ‘living’ or ‘built’ nature, that heritage sites can be either cultural or natural, and that even intangible expressions of ‘popular’ culture deserve respect and acknowledgment of cultural value (UNESCO, 1972).

These shifts in the consideration of heritage have also been reflected on the understanding and definition of ‘cultural tourism’. While in the past travelling for cultural purposes was a prerogative of the upper classes, nowadays people with different education and income levels have the chance to visit cultural destinations, thus making it possible to distinguish different facets within the broad categorization of ‘cultural tourism’. For instance, Munsters (2012) identifies three different levels of engagement of cultural tourists, dividing them among *culture seekers*, *culture players*, and *culture viewers*; similarly, Origet du Cluzeau (2012) identifies the *cultural addicts*, the *intensive visitors*, and the *occasional amateurs*, while Timothy (2011) divides cultural tourists between *serious* and *casual* ones.

Regardless of the level of interest for heritage elements, the majority of cultural tourists are still highly educated people with a considerable spending power, and are more careful and respectful towards the local environment than other categories of tourists (e.g.: ‘beach tourists’) (Timothy, 2011). Therefore, cultural tourism is generally acknowledged as a desirable opportunity by many destinations, associated to positive externalities like the creation of jobs, the possibility of improving residents’ life conditions, as well as to revitalize cultural traditions and increase the public awareness about preservation needs (Munsters, 2012).

However, tourism (also in its ‘cultural’ version) can also affect in negative ways the physical, economic and socio-cultural environments where it is developed: just think of the case of Venice, where tourists’ presence has largely exceeded the city’s carrying capacity (Timothy, 2011). The challenge for the present – and especially for the future – is to keep attracting tourists towards the various heritage properties around the world, while preserving at the same time the natural and societal balance at the destinations. To do so, it is necessary to engage in forms of sustainable tourism development, focusing not only on the environmental and economical sustainability, but also on the specific ‘cultural sustainability’. According to Munsters, the achievement of the “cultural tourism sustainability mix” (Munsters, 2012, p. 42) is possible by striking a balance between the objectives of the different stakeholders involved in the cultural preservation and fruition, i.e.:

- the cultural sector aiming at *preserving* heritage sites;
- the host communities aiming at *participating* in the societal and economic returns;
- the cultural tourists aiming at enjoying a satisfactory *personal experience*;
- the tourism industry ultimately looking for *profit*.

Only through careful planning and by giving priority to the quality rather than quantity of tourism growth, it will be possible to achieve sustainable tourism developments and a sustainable “use” of culture.

### Awareness Raising through Social Media

According to UNWTO (United Nations World Tourism Organization), ICT plays a critical role for the competitiveness of tourism organizations and destinations – and for the entire industry (UNWTO, 2001),

thanks to their ability to widen access, enrich visit experience, increase ownership by adding local voice, disintermediate some relationships, and upgrade knowledge and skills (Cantoni & Tardini, 2010). Furthermore, also enterprises use ICT for addressing individual needs and wants of their consumers (Buhalis, 1998).

Social media can be used for networking, i.e., to improve and expand the social connections a person has (Ali and Frew, 2013), but also for business and other purposes: awareness raising campaigns are a specific type of communication campaigns, aiming at sensitizing the audience about specific issues and/or behaviors – to be promoted or discouraged. It is common to hear about such campaigns within the context of social marketing, a discipline that adapts commercial marketing techniques to programs designed to achieve social purposes and improve individual or societal conditions (Wood, 2012). Differently from traditional marketing, which generally aims at prompting people to buy, social marketing interventions usually aim at generating different levels of – individual or societal – change, ranging from informing the audience about specific topics and raising its awareness towards them, up to promoting voluntary behavioral changes. Adapting a framework by Varcoe (2004), Luca and Suggs (2010) identify five different levels of effectiveness of social marketing interventions: awareness, engagement, behaviors, social norm, and wellbeing. They also indicate different methods of measurement for such programs, as shown in Table 1 below. These levels should be intended in a sort of hierarchical order, in which awareness raising acts as a sort of precursor to achieve all subsequent levels: only when the addressed population is informed and made aware about the promoted issue, it is possible to promote attitudinal and behavioral changes towards it.

Table 1. Varcoe's Social Marketing Effectiveness Framework - Adapted from Luca and Suggs, 2010, p. 125.

<b>Levels of Effectiveness</b>	<b>Changes</b>	<b>Result</b>	<b>Method of Measurement</b>
<b>Awareness</b>	Increase in awareness of issue	Individual changes in awareness	Audience surveys
<b>Engagement</b>	Change of attitude, connection with the promoted concepts, contemplation of behavior change	Behavior responses to the intervention, individual changes	Audience surveys, behavioral data
<b>Behavior</b>	Individual behavior change	Individual changes in behavior	Audience surveys, behavioral data
<b>Social norm</b>	Diffusion of the desired behavior change, sustainability, political and environment changes (legislation)	Normative changes in attitude and behavior	Media, political tracking, observation
<b>Well-being</b>	Improvement in quality of life for both individual and society	Change in social and environmental outcomes	Social report, environmental and epidemiological data

Despite the abundant research in the field of social marketing, there is a wide range of different evaluation methods used to assess the effectiveness of awareness campaigns about social problems (Varcoe, 2004). Independently from the specific indicators used to assess the impacts of interventions, it is important for social marketing campaigns to make an extensive use of research all along their different development phases, and to refine the measurement methods as the goal of the intervention becomes more ambitious. For instance, as it was evident from the framework in Table 1, the use of audience surveys might be sufficient to measure changes in awareness, while to detect changes in behaviors, they should be combined with collection of behavioral data.

The choice of the communication channel is acknowledged as one of the most important decisions when planning a social marketing intervention. Several researches suggest that a combination of different channels is recommendable in order to increase the frequency and exposure of the messages, and thus the campaign's possibilities of success. It is crucial that any communication vehicle used to convey a campaign's message is chosen in accordance with the desired audience, as messages are more likely to be effective if they are conveyed by media with which the audience is highly engaged and familiar (Paek, Hove, Jung, & Cole, 2013).

Social media are increasingly being used as communication channels conveying messages of social marketing interventions (Paek et al., 2013). As any other type of communication campaigns, also the effectiveness of campaigns on social media need to be evaluated: to do so, it is crucial to choose the right social media measurement metrics (Bagnall, 2014). However, the existing literature is rather vague regarding the choice of specific metrics for social marketing campaigns conducted on social media, as the currently available metrics are limited to the measurement of stakeholders' engagement on the specific media (such as the amounts of reactions expressed, the frequency of visits, the number of followers, etc.), but they do not allow having direct indicators of the generated awareness raising or of the induced behavioral changes. Social media metrics are still in evolution and there is still much to do, in order to identify specific indicators useful to measure the effectiveness of these tools in the social marketing context.

The present research will demonstrate the effectiveness of the use of pre- and post-campaign measurements conducted via audience surveys in detecting changes in awareness and in attributing them to a specific social media intervention. The combination of this measurement method with the analysis of the social media profiles of engaged stakeholders allowed increasing the precision and likeliness of the proposed assumptions.

## Research Design

The idea to launch a Facebook campaign to investigate the potential of social media for the promotion of heritage and to raise the awareness of university students towards it, was developed in October 2016 at USI – Università della Svizzera italiana in Lugano, Switzerland. The project was launched within the vast array of initiatives conducted by the UNESCO Chair established at USI, active since 2013 in the research and teaching on the role of ICT to develop and promote sustainable tourism at WHSs.

The campaign maintained the name of a previous intervention launched by the Chair, i.e.: '#faces4heritage', and it ran exclusively on its Facebook page, for a duration of two months, December 2016 – January 2017. The overarching goal of the project was (i) to increase university students' knowledge and awareness of heritage in general – and of specific UNESCO WHSs in particular, (ii) to influence their travel intentions to visit UNESCO WHSs in the short-term, and (iii) their actual travel behaviors. To achieve these goals, the campaign focused on the promotion of the UNESCO World Heritage Sites located in Switzerland and in the Italian Region Lombardy, and it addressed the students of two universities: USI – Università della Svizzera italiana in Lugano, Switzerland, and Università degli Studi di Milano Bicocca, in Milan, Italy.

The choice to address a limited population and to promote the UNESCO sites of two geographically-limited areas is due to multiple factors. First, considering the fact that a pre- and a post-test survey had to be addressed to the same audience of the campaign, these publics were chosen for convenience reasons, as it was possible to access the mailing lists of these two institutions. Second, the chosen areas are in line with the addressed audiences, as they represent the places where most of the addressed students presumably live, or at least where they study: indeed, USI is located in Switzerland and Bicocca is located in the Lombardy. Moreover, the selected areas are comparable in terms of extension, population and number of registered UNESCO WHSs (nine sites are present in Switzerland, seven in Lombardy and three sites are shared between the two areas).

The project was designed by members of the UNESCO Chair of USI in collaboration with a class of third-year Bachelor students of USI attending a course on the use of ICT in governmental and non-profit contexts.<sup>1</sup> Their

<sup>1</sup> The course, named *Tecnologie digitali nelle istituzioni pubbliche e non profit*, was taught in Italian and took place in the Autumn semester of the academic year 2016-17.

main task was to create the contents for the campaign; however, the students' role was very important also for a better understanding of the audience's requirements and expectations, thanks to their high identification with the addressed audience.

The campaign consisted in publishing a series of Facebook posts, including a brief description of each Swiss and Lombard WHS, as well as pictures, links to allow the audience deepening the knowledge on the promoted topics, and a series of hashtags, to brand the campaign and make it recognizable. Each Facebook post included text in Italian and English, to appeal to the large part of non-Italian speaking students of USI. Some examples of Facebook posts published on 'Faces4Heritage' Facebook page are shown below in Figure 1. In addition, two brief videos were also published on the campaign's Facebook page, which represented an overview of all the UNESCO WHSs located in Lombardy and Switzerland, respectively.



Figure 1. Two examples of the Facebook posts published during the campaign '#facea4heritage'

A budget of about 350 CHF was allocated for a paid promotion of the campaign's posts. Indeed, for the purpose of the research, it was very important that the specific contents (containing relevant information to increase knowledge and awareness) would reach the audience of USI and Bicocca students, an operation that could be guaranteed only by allocating a budget on each post, and by choosing the appropriate audience's selection criteria. Thanks to the possibilities offered by the tool Facebook Ads Manager and by adopting a trial-and-error approach, it was decided to base the segments' selection on the parameters of age, location and university of affiliation. Therefore, people who indicated among their Facebook information to be aged 19-27, to be located either in Switzerland or in Lombardy and to study at one of the two concerned institutions were chosen to be exposed to the sponsored posts.

As far as the evaluation of the campaign's effectiveness is concerned, it was decided to use a combination of pre- and post-campaign audience surveys. Therefore, the implementation of the campaign was preceded by the distribution of an online pre-test survey, sent via e-mail to all the students of the two universities. The survey investigated their knowledge and awareness on various heritage-related topics, as well as their travel intentions and behaviors when it comes to visit cultural destinations. After the campaign's conclusion, a post-test survey was distributed with the same modality, to verify whether any changes in their intentions and behaviors had taken place during – and possibly due to – the campaign. Moreover, the second survey phase investigated also the campaign's reach, through the collection of information about respondents' recall, exposure levels, and degree of appreciation.

In addition to the launch of the two questionnaires, the analytical data provided by the tool Facebook Insights were analyzed to evaluate the campaign's performances on Facebook. Furthermore, an analysis of the public Facebook profiles of the engaged stakeholders<sup>2</sup> was conducted, in order to verify whether the engaged users belonged to the desired campaign's audience.

## Results and Discussion

The two surveys received different participation rates: while the pre-test survey was answered by 2'637 respondents, the post-test one was completed by 1'092 people – a decline in the number of answers, which is likely due to the short-term repetition of similar surveys.

As Bicocca University is much bigger than USI (with over 32'000 enrolled students in the former, and almost 3'000 in the latter), respondents were divided unevenly between these two institutions, as shown by Table 2. However, students of USI showed a higher interest for the research, demonstrated by a higher response rate (12% and 6% of USI students participated in the pre- and post-test survey, respectively, compared to 5% and 2% of Bicocca students).

Table 2. Division of pre- and post-test survey respondents, based on university of affiliation

Respondents to the pre- and post-test surveys		
	Pre-test survey	Post-test survey
USI students	295	178
Bicocca students	1'736	675
Others	606	239

Although the data have been analyzed only from a descriptive point of view and no statistical validations were implemented in order to check for the generalizability of results, it can be said that the samples of respondents are quite in line with the overall populations of the two universities, in terms of gender division, distribution among education levels and faculties, and origin of students. Indeed, over half of respondents of both universities are women, reflecting the vast female presence in the two institutions. Moreover, as in the real populations, almost the totality of Bicocca respondents are Italian (with less than 5% of foreign students), while the sample of USI respondents reflects more the international environment typical of this university, with around 20% of non-Swiss and non-Italian students. The samples are also in line with the distribution of students among the different education levels, being Bachelor students the most numerous ones (between 50% and 67%) and PhD ones the least numerous. Also regarding the division in faculties, the samples reflect the real situation in the two institutions.

Before moving to the presentation of results, it is important to consider that the experiment includes an intrinsic limitation of online surveys, i.e.: the fact that the final samples of respondents were somehow 'self-selected'. Although the surveys reached all the intended universe/population, there was neither possibility to impose the participation to all receivers, nor to control for the type of respondents who actually completed the surveys.

From the descriptive analysis of the answers to the two surveys and from the comparison between them, it was possible to assess the students' level of knowledge about heritage, their travel intentions, and their actual behaviors when travelling to cultural destinations. It was also possible to detect if some changes in the levels of awareness about specific heritage-related topics occurred after the implementation of the campaign '#faces4heritage'.

<sup>2</sup> Engaged stakeholders are intended as those Facebook users, who have expressed some reactions to the campaign's Facebook contents, or have commented or shared them.

## Awareness

In the second phase of the survey, respondents have shown a higher awareness of the Swiss and Lombard heritage, as higher percentages of students were able to indicate correctly the names and/or locations of UNESCO WHSs located in these two regions, as shown in Table 3.

Table 3. Variations in the levels of awareness about Swiss and Lombard heritage in the pre- and post-test survey phases, divided according to respondents' universities of affiliation and education level.

<b>Respondents aware about Swiss and Lombard UNESCO WHSs</b> (i.e.: respondents able to indicate spontaneously at least one correct WHS located in these areas)		
	Pre-test survey	Pre-test survey
USI students	40%	38%
Bicocca students	15%	20%
Bachelor students	16%	22%
Master students	25%	27%
PhD students	26%	20%

If we analyze separately the answers based on campaign's recall, in order to verify whether the increase of awareness in the second survey could be linked to the implementation of '#faces4heritage' and exposure to it, the plausible influence of the campaign is confirmed: respondents recalling '#faces4heritage' demonstrated to be more aware of Swiss and Lombard WHSs than respondents who were unaware about the campaign (35% versus 20%).

Moreover, an increase in the awareness about heritage destruction has been recorded in the post-test survey (as displayed in Table 4), signaling a potential 'spillover effect' of the campaign, i.e.: despite '#faces4heritage' has not directly addressed this topic, it might have instilled in some exposed students the desire to be more informed about different heritage-related topics, including heritage destruction.

Table 4. Variations in the levels of awareness about the problem of heritage destruction in the pre- and post-test survey phases, divided according to respondents' universities of affiliation and education level.

<b>Respondents aware about the problem of heritage destruction</b> (i.e.: respondents able to indicate spontaneously at least one endangered/destroyed heritage site)		
	Pre-test survey	Pre-test survey
USI students	40%	47%
Bicocca students	34%	37%
Bachelor students	32%	39%
Master students	39%	43%
PhD students	48%	51%

To support the hypothesis of the positive influence of the research on students' awareness about heritage destruction, two arguments can be presented:

1. When asking about the sources used to become aware about this specific topic, it emerged that 17 students (2% of the total sample) searched for some information after participating in the first phase of the research (i.e.: after the completion of the pre-test survey, thus confirming its potential 'spillover effect').
2. Respondents who stated to have participated in both surveys demonstrated to be more aware than those attending only the second survey (as displayed in Table 5), proving that exposing students to multiple research steps is useful to increase their awareness about the promoted topic.

Table 5. Difference of awareness about the problem of heritage destruction demonstrated in the post-test survey by respondents exposed and unexposed to the pre-test survey.

<b>Respondents aware about the problem of heritage destruction (i.e.: respondents able to indicate spontaneously at least one endangered/destroyed heritage site)</b>		
	<b>USI</b>	<b>Bicocca</b>
Respondents who recalled participating in the pre-test survey	57%	46%
Respondents who did not recall participating in the pre-test survey	43%	35%

However, it is also important to acknowledge that the recent retake of Palmyra in December 2016 – and the consequent media coverage – might have played an important role in the students’ increase of sensitivity towards this problem, too.

Another interesting datum can support the hypothesis that the campaign had a positive impact on the respondents’ awareness about heritage. When asked about which UNESCO WHSs they had visited in the past six (in the pre-test survey) and three months (in the post-test survey), respondents who had been exposed to the campaign demonstrated a higher ability to remember and correctly indicate the visited WHSs as shown in Table 6. This fact might signal an overall increase of students’ sensitivity towards world heritage, demonstrated through an increased attention towards the UNESCO label.

Table 6. Difference of awareness about WHSs visited in the past demonstrated in the post-test survey by respondents exposed and unexposed to the campaign.

<b>Respondents aware about the UNESCO WHSs they had visited in the short-term past (i.e.: respondents able to indicate at least one site visited, which is part of the WHL)</b>	
Respondents who recalled the campaign ‘#faces4heritage’	69%
Respondents who did not recall the campaign ‘#faces4heritage’	51%

### Travel intentions and behaviors

While positively affecting the students’ awareness about various aspects of heritage, it seems that the campaign has not succeeded in influencing respondents’ travel intentions and behaviors. Indeed, when asked about the intentions to visit a UNESCO WHS in the short-term future (three months), students answered in almost identical ways in the pre- and post-test surveys, showing a moderate intention to do so (around 30% of respondents of both universities’ indicated to be willing to visit a WHS). Similarly, the visitations of WHSs during the period of campaign’s implementation seem not to have increased: answers to the post-test survey showed even a decline in the students’ actual visitation of UNESCO sites (shown by Table 7), a fact that can be connected to tourism’s seasonality issues. Indeed, the campaign and the post-test survey were implemented during the winter months, a period typically not favorable for students to plan or undertake journeys.

Table 7: Decline in the visitation of UNESCO WHSs demonstrated in the post-test survey phase by respondents of the two concerned universities.

<b>Respondents indicating to have visited some UNESCO WHSs in the short-term past</b>		
	<b>Pre-test</b>	<b>Post-test</b>
USI students	75%	55%
Bicocca students	65%	49%

## Campaign Reach and Recall

The Facebook paid promotion has allowed boosting the performances of the campaign. The 26 posts shared on the Facebook page have collected a total coverage of 135'048 users, with an average of around 5'200 people reached per post and the highest number of people reached per post of 9'067.

As anticipated in the methodological section, the post-test survey collected information also on the campaign's reach and recall, revealing positive data. Indeed, the campaign was recalled by well 20% respondents studying at USI and by 15% of respondents studying at Bicocca. These students – all provided with a Facebook account – were able to recall the campaign either spontaneously (when asked about the possible exposure to a social media campaign promoting Swiss and Lombard WHSs) or after visualizing some hints like screenshots of the campaign's Facebook posts and hashtags. Moreover, through further questions in the post-test survey, it was possible to identify three different engagement levels among students who demonstrated to have been exposed to '#faces4heritage':

1. The most engaged ones were those who did not only pay attention to the campaign's contents, but also interacted with them on Facebook (through likes, comments or shares), accounting for 17% and 28% of Bicocca and USI exposed respondents, respectively.
2. 22% of USI and 29% of Bicocca exposed respondents showed a medium level of engagement: they could recall the campaign's materials, but did not interact with them.
3. The lowest level of engagement is represented by those students who remembered the campaign from a visual point of view, but stated to have ignored it because of scarce interest (around 50% of both universities' exposed respondents).

Furthermore, respondents who could recall the campaign were asked to express their level of appreciation on a five-point scale ranging from 'Not at all' to 'Very much'. Only 9% of Bicocca students affirmed not to have liked the campaign at all and 25% of both universities' respondents chose the second option of the scale ('Little'). On the other hand, half of respondents (50%) showed to be positively oriented towards the campaign ('Somewhat'), and the remaining ones (around 20%) stated to have liked the campaign 'Much' or even 'Very much'.

The Facebook public profiles of people who have liked, commented or shared the Facebook posts, have been analyzed in search of information regarding the university of affiliation, the profession and the place of origin or residence, revealing that the campaign has attracted not only the attention of the desired populations of USI and Bicocca students, but also other stakeholders' groups, such as students of other Lombard and Swiss universities, former students of the concerned institutions, or simply young people living in Ticino (Switzerland) and Lombardy (Italy).

## Conclusions

### Theoretical Contributions

Filling a gap in literature, this research tried to answer to the overall research question on the effectiveness of social media as communication tools to sensitize the population towards the value of cultural heritage. The main results emerging from the analysis of the campaign answer positively to the question: the '#faces4heritage' campaign can be considered a positive experiment in this regard, as it has managed to appeal to the desired audience of university students, engaging them through the investment of a relatively low budget, and – most importantly – it has positively influenced their awareness towards some heritage-related topics.

Considering the fact that the campaign was conducted on a small-scale and that it had clearly some limitations – limited budget and "wrong" season of implementation, the fact that it managed to reach 15-20% of the desired audience reveals that the strategic choices behind its design and implementation were correct, and proves the fact that social media can effectively be used in a constructive way for heritage promotion, with interesting results and relatively low investments. As the research presents the experience



of the launch and implementation of a social media campaign, testing strategies to measure its impact on the awareness and behaviors of the involved stakeholders', this work can also drag interest of researchers in the area of the effectiveness and impact of social media, providing them with a methodological contribution.

### **Managerial Implications**

As stated in the introduction paragraph, the research might be of interest for various professionals in the heritage and tourism fields, by providing them with insights about the level of knowledge of young people about local heritage, and by drawing their attention on the potential of a constructive use of social media in the context of heritage promotion and awareness raising.

It could also be of interest for local institutions or world heritage sites managers, as it can help them drag resources on communicating online through dedicated pages: the study has highlighted the fact that students are aware of the existence and importance of the UNESCO recognition, although not being well informed about the specific heritages included in the World Heritage List, even those sites around them, showing the potential of social media to increase their awareness about local heritages in simple and effective ways.

### **Limitations and Future Research**

As mentioned above, the work has encountered some limitations. First, the campaign was conducted on a small-scale: only two universities have been involved, of two different but close countries.

Furthermore, a limited budget has been spent and the "wrong" season of implementation has probably affected the students' involvement (the best exposing period for our audience would have been summer time, for the higher willingness to visit of university students – and for their higher interests in information on the best places to visit).

Nevertheless, we are confident that the present research can contribute to satisfy the interest of researchers and professionals about the possibilities offered by social media in the heritage-promotion context; continuing the project or implementing similar ones may allow achieving even more positive results and generating the link between increased awareness and travel intentions and behavioral changes, which has not been investigated in this study.

Furthermore, the analysis of the performances of the campaign can be deepened by moving beyond the mere descriptive analysis and by implementing statistical tests in order to determine with more precision whether the results would be extendible to the entire populations of students of the two concerned universities.

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# How Could a Social Network Analysis Boost an Evolutionary Ecosystem in Cultural Heritage Tourism?

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*Research Note*

**Keywords:** Social network analysis; Heritage; Ecosystem evolution; Cultural Tourism.

## **Abstract**

Cultural heritage has become a valuable resource: It unites physical assets, such as buildings, and the living culture, that make it possible to isolate the themes and narratives essential to what is termed *place-making* (Richards, 2011). This *research note* presents a research proposal addressing the following research question: How could a social network analysis (SNA) boost an evolutionary ecosystem in cultural heritage tourism? A longitudinal case study identifies the current formal and informal ties of a group of stakeholders. That information in turn makes it possible to assess their cohesiveness and predict the future success of an ecosystem. The current study is warranted because research using a combination of an SNA and interactive network theories is scarce, and its practical implications are significant.

## **Introduction**

A longitudinal case study is conducted to propose a social network analysis (SNA) to answer the following research question: **How could a social network analysis boost an evolutionary ecosystem in cultural heritage tourism?** We will identify the current formal and informal ties of the participants in a tourism ecosystem, which makes it possible to assess their cohesiveness and predict the future success of the ecosystem.

Our research proposal is driven by an empirical case. The owner-manager of a micro-firm in the cultural tourism field has taken an active role to promote historically valuable buildings and (industrial heritage) environments as cultural tourism destinations. The local policymakers have so far shown no interest in revitalizing the cultural heritage of the destination, and the regional destination management organization sees no value in re-branding it as a tourist destination. The owner-manager has been compelled to find partners and private investors who share her values and vision of the cultural heritage of the destination (an area of villas) as a potential global cultural tourism destination. So far, she has managed to tie a core group of partners to developing a wider ecosystem around her vision. That ecosystem could serve as a pilot for a wider ecosystem for nationwide service provision in cultural tourism.

The mission of the group of current stakeholders is based on five elements:

1. to utilize historically valuable estates and environments for an eco-luxury cultural tourism business on a large scale, and by doing so to save a property of national interest in Finland;
2. to innovate flexible pop-up accommodation close to historical value buildings;
3. to develop an eco-luxury-based network and media platform with premium service provision targeting a well-defined customer segment on the global market;

4. to pilot the concept of the service provision through an eco-luxury tourism ecosystem consisting of the valued estate buildings and several cultural heritage milieus located in the province in question.
5. to connect a group of enterprises / eco-luxury cluster onto a virtual platform.

The main contribution of the study is to illustrate how the intervention of the SNA influences the existing network. That involves proposing an index of the change between the existing and potential network. The data obtained provide an opportunity to determine a potential for spillover effects between the existing stakeholders and potential stakeholders within the network (in terms of exchange of information, knowledge, innovation, etc.). Moreover, we will be able to assess the level of the impact on the local region, to acknowledge specific assets of networking, and stakeholders' attitudes toward the future ecosystem.

In addition to the social network approach (Granovetter, 1973; Saxena, 2005) our network-related standpoint stems from the IMP school of thought outlining the network management, particularly in the context of tourism (e.g., Dredge, 2006; Von Friedrichs-Grängsjö & Gummesson, 2006; March & Wilkinson, 2009), and more recently in the arts (Luonila & Johansson, 2017). Combining an SNA and interactive network theories is, however, still in its infancy, thus meriting our study.

### Literature Review

The theoretical approach of our study will be based on the SNA (Granovetter 1973; Saxena 2005). Our network-related standpoint stems from the IMP school of thought outlining the network management as an essential business capability. The approach can be exemplified by the work of Håkansson and Snehota (1989) who point out that firms and organizations do not act independently in the market. The network can also be defined as an industrial (Håkansson & Snehota, 1989) and value creating entity (Möller & Törrönen 2003). During the last decade, the network approach has been widely utilized in the context of tourism (e.g., Dredge 2006; Von Friedrichs-Grängsjö & Gummesson 2006; March & Wilkinson 2009) and more recently in the arts (Luonila & Johansson, 2017).

In an SNA the structural dimension refers to the overall network structure and the actors' position within it, but it is also necessary to understand the egonet structure of each actor (Casanueva et al., 2013). Therefore, our research will have two phases. The first phase proposes a network structure based on the egonet perception of prominent actors in a clearly defined area. By defining all the members of the network, we will be able to examine the whole network structure. The second phase examines the (egonet) core of the network and all stakeholders interested in collaboration. It then proposes a possible network structure that would arise as a consequence of an intervention of the SNA.

Wasserman and Faust (1994) have proposed two broad approaches for determining the limits of a network. The first is an external definition determining the elements of the network, while the second involves a researcher specifying the limits of a network (Casanueva et al., 2013). The sample size in our research will be determined through a combination of sampling techniques such as the snowball form, prompting prominent stakeholders in the region to generate names during interviews, and through focusing on the region that is perceived to be important from the SNA perspective. Our study sample will be outlined based on the egonets that form around an ego that is taken as a reference (Van der Gaag & Snijders, 2005).

### Research Design

The research will initially focus on the core of the existing network. We have already interviewed the initiator of the network to define the drivers of the evolutionary process during 2016–2017. In the remainder of 2017, we will analyze the social network comprising the stakeholders of the *current* network, and then in 2018 the stakeholders of the *potential* network.



## Social Network Analysis

*Interviews of stakeholders, defining the core and the inner circle of the present network*

- a. We will define a geographical or administrative area for the ecosystem, which will be influenced by the proposed SNA.
- b. We will conduct semi-structured interviews with a snowball technique with all important stakeholders in the chosen region, such as representatives of the local community; cultural institutions; heritage attractions; travel agencies; DMO, DMC; academic and educational institutions; private sector (entrepreneurs); NGO; national, regional, and local authorities.

*Surveys of stakeholders, defining the outer circle of the present network*

- c. We will determine the characteristics of the existing network by using a social network questionnaire.
- d. We will investigate the relationships between the members of the network, and the level and existence of collaboration.

*Surveys of stakeholders, defining the outer circle of the potential network interested in collaboration*

- e. We will determine the potential collaborators of the future network.

*We will assess the potential success of the future network.*

## Procedures of the Study Proposal

Questionnaires are used to create an *adjacency matrix* that represents the relationships among stakeholders in a network (Timur & Getz, 2008). Specifically, a matrix will be created by coding the presence (usually 1), or absence (usually 0) of stakeholder collaboration (Timur & Getz, 2008). The constructed adjacency matrices will later be entered into UCINET VI to compute the network measures and map relations between the network members.

Centrality values (degree, betweenness and closeness) will be calculated by analyzing results obtained through the use of an ego-network questionnaire, while the results of the whole network questionnaire will help in calculating size, centrality, and density. Calculating the centrality values (degree, betweenness, and closeness) makes it possible to isolate the stakeholders with a central position in the network. The centrality values reflect a stakeholder's network position related to a specific topic (Scott et al., 2008), in this specific case, marketing activities, information sharing, innovation, and knowledge exchange. Accordingly, those stakeholders recognized as central will have a key role (Timur & Getz, 2008) in regional information, knowledge, and innovation flow, and have the capacity to direct promotional activities. This result could improve the effectiveness of coordinating the network itself (Dredge, 2006).

Finally, we will illustrate the difference between the existing and potential network. Doing so will involve closely examining differences between the existing and potential network related to density values. Density is used as measure for the whole network in order to determine if a network is loosely or firmly connected. The index of a change will also be presented. This index will suggest a possible change in the current state of a network, and therefore provide information about a capacity of the full project implementation. A change in the number of stakeholders involved and the essence of their relationships will suggest the impact of the evolutionary process in the region, and forecast a bright future or imminent failure. This study is also of a longitudinal nature, as it provides analysis over time, starting by assessing when the evolutionary process started and proceeding through the following fully functioning stages.

## Results and the Outlined Outcome of the Study

We will follow the evolution of the ecosystem in a longitudinal study with the researchers representing the fields of tourism, cultural heritage, network branding, and entrepreneurship. Conducting *A Social Network Analysis of an Ecosystem Evolution in Cultural Heritage Tourism* will help to identify attitudes of the

stakeholders to co-operation, and thus the future success of the ecosystem, and also to assess the impact of the ecosystem on the local community. Based on the analysis of the results, the SNA will help direct the development of the evolutionary process toward a more successful performance of the ecosystem. A practical implication of the research will be to more accurately define overall regional prosperity. Identifying which group of stakeholders (or which specific stakeholder) offers the greatest potential in terms of future collaboration will enhance the positive impact of the ecosystem on the region.

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# Time Travels and Memory Sites. Cultural Heritage of a Family Enterprise as Business Resource

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*Full Paper*

**Keywords:** family enterprise; cultural heritage; memory site; history management; business resource; tourism.

## **Abstract**

History and narratives can be considered essential business resources. History can be utilized in strategic planning, in marketing, and in shaping organizations' culture and identity. In business studies, this kind of use of history is called *history management* (Herbrand & Röhrig (Hrsg.), 2006). In this paper, I will demonstrate how a family enterprise uses its history and the historical domicile of the company in creating corporate image and local business. The phenomenon is studied from the point of view of managing changes as well as from the point view of reusing and preserving cultural heritage.

As a case I will use one of the oldest Finnish family enterprises, A. Ahlström Corporation, and the West Finnish Noormarkku works that has belonged to the company since 1870. My study shows that history culture of a family enterprise, the ways of constructing and using impressions about the past, receives its characteristic features in every era. To guarantee the continuation of local operations in the 21<sup>st</sup> century the cultural heritage is utilized as symbolic capital to support the development of local business and tourism. Meanwhile the Noormarkku works is a memory site for the industrial family, the historical area is also used as a site for the new business. History and stories of the industrial family and the industrial corporation are used as non-material resource for new business activities. The built heritage forms the operational environment for the business. The study also shows that history culture of a family enterprise also shapes locality and local cultural heritage. My study is both qualitative and cross-disciplinary. I apply approaches of cultural heritage studies and business studies. The article is related to my doctoral research (Grahn, 2014) that examines the interplay between a family business and a place and the use of cultural heritage in that context.

## **Introduction**

Company's cultural heritage, both material and non-material, can be regarded as *symbolic capital*. Symbolic capital (Bourdieu, 1998) refers to such a feature that symbolically turns effective when people recognize it and start to value it. A company can use this kind of symbolic capital to build and strengthen its corporate culture, corporate identity and image. In addition, cultural heritage of a company can also be utilized in developing new businesses and in revitalizing local economic life (Timothy, 2011, pp. 377–378). The aim of this paper is to study how the cultural heritage of the family enterprise is utilized as symbolic capital to develop local business and tourism. Unlike the previous studies concerning the use of corporate cultural heritage (Feldenkirchen, 2006; Herbrand & Röhrig (Hrsg.), 2006; Schug, 2010; Westin et al., 2002) the aim of this study is to highlight the point of view of managing changes and continuity as well as the point view of reusing and preserving cultural heritage.

My study is a case-study. As a case I will use an old Finnish family enterprise, A. Ahlström Corporation and the West Finnish Noormarkku works that has belonged to the company since 1870. When investigating family businesses, it is essential to remember that family businesses distinguish themselves from other organizations because of the dynamics of the family, and the will to work for own business and future generations. Traditions and continuity are essential elements in the values of family businesses. Every family

has its own culture and traditions (Komsj, Lindström, & Zetterberg 2002; Niemelä, 2006; Elo-Pärssinen, 2007). Family businesses are also often regarded as significant local actors. Companies that have operated locally for decades can mean special reserves to local community. They are regarded as responsible and influential members of the community (Elo-Pärssinen, 2007, p. 68).

The recent studies concerning the use of history in business context (Herbrand & Röhrig (Hrsg.), 2006) usually apply to the concepts of traditions, narratives and history (in German studies *die Tradition, die Historie* and *die Gesichte*). In my study, I speak about *corporate's cultural heritage*. Cultural heritage is a wide concept. Cultural heritage refers to those traces of the past, both tangible and intangible, that a community or a group has chosen and utilizes for memorial purposes, to maintain their awareness of history and to build their identity. Tangible cultural heritage refers to buildings and historic places, monuments and other artifacts that are considered worthy of preservation for the future. Intangible cultural heritage refers to the practices, representations, expressions, knowledge, skills that communities and groups recognize as part of their cultural heritage. Cultural heritage is constantly recreated by communities and groups in response to their environment, their interaction with nature and their history, and provides them with a sense of identity and continuity (Isacson, 2005; UNESCO, 2003). Cultural heritage is always shared and participated, and the social group connected with the same cultural heritage can be called *community of heirs* (Sivula, 2010). In this study, I apply the concept of cultural heritage in business context. I argue that a corporate, in this case a family business, can also be studied as a community of heirs.

I have defined that the cultural heritage of a family business includes historical buildings and other material imprints in history, as well as various representations of the past and oral history. When studying a family business, it is important to also examine the role of emotional factors and spiritual heritage. For this reason, I have diverged slightly from the approaches used in previous business studies. I have included in the cultural heritage of a family business also traditions that are connected to the continuity, ownership, domicile and social responsibility (Grahn, 2014).

My approach is both qualitative and cross-disciplinary. I apply approaches of cultural heritage studies and business studies. The approach is nevertheless primarily concerned with the viewpoint of cultural heritage studies. The study of cultural heritage examines the birth of material and immaterial cultural heritage, as well as its evolution, transfer, utilization and position in everyday life, communication and identity (Tuomi-Nikula et al., 2013, pp. 19–20). These aspects are also present in this study when I examine how and why a family enterprise uses its cultural heritage as business resource in the 21<sup>st</sup> century. Business resources consist of material and non-material resources. Material resources include engines, raw-materials and buildings. Non-material resources include for instance licenses, innovations and reputation (Grant, 2005). Thus, buildings and environments connected to company's history are considered as material resources while company's history and stories are included in non-material ones.

Manifestations or expressions of the organizational culture are called *artefacts*. These expressions are used consciously to inform and direct affairs. As noted by Hatch and Duncliffe (2006), artefacts can be divided into three categories: *objects* (e.g. art, logo, architecture, uniforms, products, tools, signage), *verbal expressions* (e.g. jargon, theories, stories, myths, legends and their heroes and villains, metaphors, speeches), and *activities* (e.g. ceremonies, meetings, communications patterns, traditions, social routines) (pp. 185–189). By studying some examples of activities, verbal expressions and tangible objects of the company I will point out the role of historical buildings, authorised history and stories as business resources in developing local business.

This paper is partly related to my doctoral research (Grahn, 2014) that examines the interplay between a family business and a place and the use of cultural heritage in that context. The research period of the dissertation spans from the end of the 19<sup>th</sup> century to the 21<sup>st</sup> century. In this paper, I will focus especially on the actions connected to tourism development in the early 21<sup>st</sup> century. In this respect, the study is based on newspaper articles, company brochures, web-sites, and personal observations I have made during 2013–2015 while I was participating two museum projects of the company.

## Cultural Heritage as Business Resource

History is utilized for three essential purposes (Aronsson, 2004). It is utilized to produce meanings, to confirm legitimacy, and to manage changes. These tasks are on the background of all use of history whether it is matter of using history in commercial, political, individual or scientific context. These tasks or motives can be also applied when studying corporates' *history culture*. History culture refers to the ways of constructing and using impressions about the past. History culture can be regarded as an umbrella term that refers to all types of history use, production, formation and transmission of historical images (Sivula, 2014, p. 30; Salmi, 2001, pp. 135–137). History culture receives its characteristic features in every era. In this paper, I will show that utilizing the corporate history in tourism development can be regarded as an expression of changed history culture.

History and narratives can be considered essential business resources. In recent years, the use of history within corporations has also been examined. For instance, in the German business studies it has been examined how the old European companies have utilized history in strategic planning, in marketing, and in shaping the culture and the identity of organizations (Herbrand & Röhrig (Hrsg.), 2006). In business studies, this kind of active use of history is called *history management* or *history marketing*. History management refers to a comprehensive strategy, to a planned and integrated use of history. History marketing can be considered as part of history management and it refers to maintaining and developing the existing brand by utilizing the history and traditions connected to the brand. The most typical instruments utilized in history management are various publications, museums and exhibitions on corporate history (Feldenkirchen, 2006; Herbrand & Röhrig (Hrsg.), 2006; Schug 2010).

According to previous studies (Feldenkirchen, 2006, Herbrand and Röhrig (Hrsg.), 2006; Schug, 2010; Westin et al., 2002), long corporate history can be important in business marketing and communication. A long and successful history is connected to continuity, solidity, credibility and innovativeness. However, the use of history does not solely mean looking backwards. Instead, by using the history companies express that certain elements of the corporate culture have long traditions. It is a question of understanding the connection between the past, the present and the future. This understanding is needed in managing continuity and changes.

According to Hansen (2007), narratives serve as foundations for cultural assumptions and values. The past lives in the organization's memory. Historical narratives can be regarded as the backbone of the organizational culture and that is why they play an important role in understanding organizational change and even inertia. Hansen reminds that historical narratives are representations, and they should not be confused with the past. Narratives are always produced by someone, and they are used to build and maintain the identity and image of the organization. In business context, the narratives can be produced by owners, especially when it is a question of a family business, by company's management, marketing or communication administration department and also by company's employees (Darphin, 2002, pp. 20–21; Rother, 2006).

Corporate architecture is an expression (an artefact) of organizational culture, and it is also frequently used to symbolize history and traditions. The architecture can come to stand for different epochs in the corporate story (Berg and Kreiner, 1992; Mikkonen, 2005). Buildings from the company's earlier days might be regarded almost as *sacred places* because they symbolize the historical roots and the long evolution and development of the company. The buildings connected to company's past can include for instance manufacturing plants, office buildings, dwellings for the owners and workers. These kinds of symbolic buildings are usually located in the historical domicile of the company. In this paper, I will study how a company's domicile can be constructed to a memory site and tourist attraction.

Recent studies (Westin et al., 2002) show that several factors and motives affect the utilization of corporate cultural heritage. For instance, form of business, line of production, client and staff structure, location and competitive conditions can influence whether the company uses its cultural heritage or not and how the heritage is utilized. Especially the importance of the form of business and the location of the company are factors that I have examined in my study. According to previous studies it might be easier to validate cultural historical targets in an old family business that has operated for several generations than in a big exchange-



listed company. Another significant factor may be the location of the company. If the company has operated at the area for a long time it does not have to highlight its history to the staff or to the local community. On the other hand, if the company has been locally so influential that its history has become a remarkable part of local history, the company may feel obliged to maintain the cultural heritage with care. The client structure also affects the use of history. For corporate clients, the company may show historical environments and publications to build and strengthen client relationships. If the main clients are consumers the historical environments may be utilized to create experiences. As my study will show, there is often overlap between the different motives to utilize cultural heritage in business context.

Companies utilize their cultural heritage for several reasons (Darphin, 2002). The strongest motive seems to be the social and cultural responsibility. Cultural heritage is utilized also to strengthen corporate identity, to create and improve customer relationships, to create and strengthen the brand, and to produce additional value to the property. The investments made for cultural heritage are usually targeted to employees, local inhabitants, the public, customers and accounts, tourists, and the media.

Previous studies (Darphin, 2002; Johnson, 2002) show that companies are significant users and maintainers of cultural heritage. Manufacturing plants and other buildings connected to companies' past are usually also valuable objects from the point of view of cultural history. Sometimes the companies continue to operate in these historical surroundings. Sometimes the buildings no longer are used for manufacturing purposes but they may be owned by the company. In that case, the buildings might be reused for different purposes. Reusing the old buildings is a way to assure that the buildings will be preserved.

### Case Presentation, Data Collection and Research Method

A. Ahlström Corporation is one of the oldest family businesses in Finland. The company grew during 160 years from a one-man company to a global corporation. The founder of the company, Antti Ahlström (1827–1896) started his business in 1851. At the beginning, shipping was the prime concern of his business. During the following decades, he expanded the business substantially buying or starting up new saw-mills. The heirs of Antti Ahlström continued developing the business, and during the 20<sup>th</sup> century A. Ahlstrom Corporation became one of the biggest Finnish industrial corporations (Schybergson, 1992).

Ahlström has been a significant local actor in Noormarkku<sup>1</sup> since 1870s. The industrial plants of the works were quite modest but the works had other special characteristics. Although the company had industrial plants surrounded with growing factory communities in several Finnish towns, for instance in eastern and southern Finland, the headquarters of the company were situated in Noormarkku until the end of the 1960s (Grahn, 2012, p. 125). Due to that, the Noormarkku works was an exceptional combination of farming, forestry and management of a significant industrial enterprise. In the early 20<sup>th</sup> century the company employed locally about 230 persons. In the 1940s, the amount of workers was approximately 150 (Grahn, 2008, p. 261). The features and social structures of the Noormarkku works were similar to other Finnish paternalistic factory communities established in the late 19<sup>th</sup> and early 20<sup>th</sup> centuries. The company had local power but was also obligated to build dwellings for the employees and provide social services, such as schools, healthcare and the church. Furthermore, the Noormarkku works has been a domicile for the Ahlström family since the late 19<sup>th</sup> century. As an expression of this attachment to place, three architecturally different residential buildings were built for the family during 1881–1939. *Isotalo*, the first *corps de logi*, was built during 1877–1881 for Antti Ahlström and his family. The Jugendstil *Havulinna* was completed in 1901 for Walter Ahlström's family, and *Villa Mairea* was built for Maire (nee Ahlström) and Harry Gullichsen in 1939. Villa Mairea was designed by the famous Finnish functionalist architect Alvar Aalto (Grahn, 2012, pp. 127–131).

The end of the 1960s was the era of huge changes. The company had grown substantially and took its first steps towards globalization. At that time, the company had also come to the point when organizational changes were unavoidable (Schybergson, 1992). Along these changes the headquarters were transferred from its historical domicile to Helsinki and the role of Noormarkku works changed. The works started to offer education, meeting and accommodation services for the company. Until the early 1980s, the company was

still one of the most important local employers because of its forestry and farm production. The farm production was ceased in the early 1990s (Grahn, 2012, p.128).

In 2001, the globalized A. Ahlström Corporation was demerged into three separate companies. Along with this organizational change, the maintenance of company's cultural heritage was separated from manufacturing business. The manufacturing businesses were transferred to the new Ahlstrom Corporation, the private investment company, Ahlström Capital Oy was established and the new A. Ahlström Corporation took over the real estates and forest reserves owned by the Ahlström family. In 2013, A. Ahlström Kiinteistöt Oy continued as a local actor after a business operations transfer. This company still operates in Noormarkku. The business of the present company is centered on forestry and real estates, and there are approximately 60 employees at Noormarkku works. Since the early 21<sup>st</sup> century the company has also utilized its cultural heritage in tourism development.

## Empirical Results

### *Productization of Cultural Heritage*

Today, the Noormarkku works appears to be almost the same as in the past, although some of the buildings are now used for rather different purposes. The family business has always had the ambition to keep the works vital. One of the basic ideas has been that the works should not become a pure museum. Even after the headquarters were transferred to Helsinki, forestry, farming, real estate management, and education and accommodation services insured that the works was used for business operations. The workers' dwellings are today rented out for people most of whom no longer work for the company. The residential buildings of the Ahlström family are still occasionally used by the family but also utilized for meetings, education and public relations. The employees of the current company still work in the head-office built in 1916 (Grahn, 2014).

In 21<sup>st</sup> century, the company's attitude to mobilize its cultural heritage and the means to develop the local operation has got new forms. In 2009, the company started to offer high quality restaurant, banqueting, meeting, and accommodation services to business visitors and private visitor groups. The productization of the cultural heritage is quite typical example of manor tourism that consists of various conference services, restaurant and banqueting services, holiday packages and manor romance (Grahn, 2014). This new business has meant a totally new era for the Noormarkku works. Today the place is open also to the public. Previously it has been utilized merely by the company and the family. In company's website, the works area is today marketed as follows: "Noormarkku Works. Experiences beyond compare".

Corporate museums and exhibitions are typical instruments for utilizing corporate history. Along with the symbolic meaning, corporate museums can also be utilized as significant tourist attractions. Corporate museums include musealized manufacturing plants, other buildings connected to company's history or permanent exhibitions presenting important milestones in company's history (Hölschen, 2005, pp. 22–23; Mikus, 1997, pp. 14–16). Corporate museum is usually sited in corporate's historical domicile or in the corporate's head office. The domicile per se as an arena of past events confirms the vision of company's roots, history, continuity, and values (Völker, 2006, p. 437).

After the headquarters were transferred to Helsinki, the company started to utilize its cultural heritage as symbolic capital: the company benefited from its long history and tradition in business transactions and in globalizing the business (Grahn, 2012, p. 131). The old manufacturing plants and other historical buildings were utilized to show the historical roots of the company. The company's history has expressed solidity and a respect for tradition which made it easier to negotiate with old European companies in particular (Grahn, 2012, pp. 131–132). In 1996, the exhibition entitled the *Ahlström Voyage* was established in the Noormarkku works area. This exhibition sited in the old workshop was established to represent the company's history from the 1850's to present. The 1990s was the era of fast globalization for the company. So, the establishment of the exhibition can be considered as a conscious way to build the image of the company. In 2015, the exhibition was extended as part of the new business development. The Noormarkku works, A. Ahlström Corporation and the Ahlström family have been significant local actors, and due to that the traces

of the past reminding of the former factory community and the industrial family are integral part of local cultural heritage. The local role of the family business is also represented in the new exhibition. Along with the corporate's history the extended exhibition represents the history of the works from the viewpoint of the three groups of residents, workers, officers and owners as well as the social and cultural activities of the company. The interesting and versatile architecture of the area is also expressed. The new exhibition also expresses the significance of the company for the Finnish modern glass design. Initially, the exhibition was merely intended for the personnel, clients and owners of the company but today the biggest visitor group is the cultural tourists.

Along with the exhibition Ahlström Voyage, there is an old sawmill that was converted into a museum in 2014. The frames of the sawmill were used for the last time in 1956. The sawmill functioned as an internal museum of the company in the 1970's and the 1980's and to some extent also in the early 1990's. After that it was closed for a while. The new sawmill museum represents the entire life cycle of the sawmill and its local importance. It also explains the importance of the sawmill industry for the Finnish industrialization in general.

Today, both the sawmill museum and the exhibition are open for public by appointment. Tourists can visit these places for instance during special Noormarkku works tours. During the guided walking tours, tourists can also become familiar with the entire area and the world-famous Villa Mairea designed by Alvar Aalto. In 2016, the number of visitors to the sawmill museum and Ahlström Voyage was approximately 5.000 visitors. Villa Mairea receives yearly 3.000–3.500 visitors.



Figure 1. The old sawmill of the Noormarkku works in 1955 (Photo: Archive of A. Ahlström Corporation).



Figure 2. During the sawmill museum project, the architects got an inspiration from an old photograph taken in 1950's. A new bridge to the museum was constructed following the direction of the original rails that once led from the sawmill to the timber yard (Photo: Grahn, 2014).

Company's operational environment can be regarded as an expression of company's identity and culture. At the same time, the operational environment serves as meeting place for the company and for its interest groups (Andelmin & Casagrande, 1994, pp. 141–143). The built heritage of Noormarkku works symbolizes company's history and roots but at the same time it is utilized for creating concrete framework for the new business. The built heritage is used as material resource. Well preserved built heritage confirms the interest groups that the family enterprise takes care of the valuable cultural heritage. By 2012, the company had invested approximately 10 million euros in the renovation of the works area (Lundén, 2012, pp. 48–49). After that, even further investments have been made.

Cherishing the cultural heritage requires active preservation but that does not mean that the target remains the same (Aarnipuu, 2008, p. 223). In Noormarkku, the development of the new business can be regarded as one way to keep the works vital but at the same time these new processes have inevitably meant some changes. The renovation operations of the houses have been designed in cooperation with museum authorities. The changes do not however concern all buildings. The old worker's dwellings and some of the officers' dwellings are still used for habitation. Furthermore, Isotalo, the residential building that was built to company's founder, Antti Ahlström, and to his family remains merely in family use. This house has a symbolic meaning for the Ahlström family. The house represents almost a relic remaining from the past that should not be touched (Andelmin & Casagrande, 1994, pp. 141–143). Some of the officers' dwellings and the former office building for the sawmill have been converted for meeting and accommodation services.

### ***History and Stories as Non-material Resources***

When using cultural heritage in business development the most suitable part of the heritage will be chosen: the part that suits best for representing the place and the culture and on the other hand will return profit as business resource (Aarnipuu, 2008, p. 215). In producing new services at the Noormarkku works the history



of A Ahlström Corporation and the Ahlström family is utilized as significant non-material resource. The services are sold with the help of images connected to the history of the family enterprise. In company's brochures and on the website a frame story for the business is created with the help of stories and photographs. In business development, also the status of the cultural heritage of the works is utilized: in 1993, the Noormarkku works was defined as *NATIONALLY* important cultural historical environment (Putkonen, 1993, p. 151). One of the oldest Finnish industrial companies has also its own status.

In tourism, local resources are always utilized. In these processes, traces of the past are utilized as cultural capital. In developing tourism, the creation of *imagined places* and *spatial narratives* is as essential as the physical environment (Meethan, 2001, p. 98). People visit cultural places usually to learn something new, to be edified or to enjoy themselves. Thus, interpretation forms a significant part of that experience. Interpretation refers to the act of revealing the importance of a place, person, artifact or event. Interpreting means telling the story in such a way that visitors will want to learn and perhaps return again and again. High-quality interpretation can even add value to an attraction and give competitive advantage over other cultural places in the same area (Timothy, 2011, p. 228).

In the Noormarkku works area, every building has its own history and with the help of storytelling the guides present the past of the place, the family and the company to the visitors. Along with the authorized corporate history these stories are significant in representing the past. The contents of the guidance depend on visitor groups. Business visitors may be interested in the highlights and milestones of the company where as senior visitor groups may be more interested in the everyday life at the works or in the bourgeois life of the Ahlström family. Interesting details and anecdotes are utilized to make the guidance tours at the same time entertaining and edifying.



Figure 3. Scalemodel

A scale model of the Noormarkku works area produced by Taina Pailos in 2014 is located at the *Ahlström Voyage* -exhibition. It illustrates a certain day in company's history, the 16<sup>th</sup> of May 1955, and how the works might have looked like at that time. The general meeting of the company was held in that very day, and the miniature figures present some of the family members, officers, as well as workers of the works (Photo: Esa Kyyrö, 2014).



Along the local history also the non-local history is utilized in the business development. There is an officer dwelling, *Villa Ett*, completed in 1916, that has been a residence for several officers. The building has also had a significant role in local history during the Finnish civil war in 1918. However, in productization of this house the company has instead of the local history utilized company's industrial history. The building consists of several meeting rooms, and they are named after different industrial areas that once have been in the possession of A. Ahlström Corporation. For instance, there are three meeting rooms that are named Karhula, Iittala and Riihimäki after company's glass works.

The history of the glass works is not a local value but it is an important part of the company's and the Ahlström family's history. Art, culture and internationality, that have always been close issues to the family have been inspiring when naming the meeting rooms. While the old officer dwelling has got a new use the building also has got a new spatial narrative by utilizing non-local values. This new narrative is confirmed with the help of industrial design utilized in furnishing the building. By this way cultural heritage is recreated and offered to the visitors. At the same time, this cultural heritage is utilized to confirm company's image and to achieve profit in business (Grahn, 2014).

The study shows that during past few years, the role of Noormarkku works as a *memory site* for the family business and the family has strengthened. Memory site refers to traces of the past that gather the members of the community to remember and interpret the past and to reproduce their awareness of history. In such case, cultural heritage is used a memorial. A place of memory can be a real place or building. It can also be a historical figure, a ritual, a text, a symbol or an old habit (Nora, 1998). Memory sites however sometimes tell us more about the history of remembering than about actual event that is being remembered. Traces of the past that have been preserved in the Noormarkku works tell us about the past but also about the ways in which the family business has interpreted and understood its own history. The company no longer has significant manufacturing plants in Finland, but the history and some traces of the company's industrial past have been gathered in Noormarkku works. In the 21<sup>st</sup> century this cultural heritage is also utilized with the aim of improving local economy and tourism. On the other hand, business activity that uses cultural heritage is also a means to cover at least part of the costs of maintaining historically important buildings.



Figure 4. Bronzestatues

In 2016, two bronze statues originally designed by Finnish sculptor Emil Cedercreutz (1879–1949) were put up in the works area. Cedercreutz made the plaster casts already in 1920 but the statue project was then postponed. The statue project was finally carried out in summer 2016 when the head-office of the company had the 100<sup>th</sup> anniversary. The bronze statues illustrate felling and log floating that both had important role in Finnish forestry industry and in the history of A. Ahlström Corporation (Photo: Tiina Rajala, 2016).

### Using Cultural Heritage – Managing Changes and Creating Locality

Cultural heritage is utilized in branding and revitalizing places and developing tourism. At the same time, cultural heritage can also have a significant role in developing company's brand. In my study, I have examined the motives and mechanisms that effect on the background when a company utilizes its history and cultural heritage in tourism.

The study shows that in economic context cultural heritage always has a strategic role. Cultural heritage can be regarded as an essential business resource although it is not measurable capital like production resources. Cultural heritage is symbolic capital. Every company has its past but the ways and instruments to maintain and reproduce cultural heritage can be different (Darphin, 2002). As the case shows, cultural heritage is maintained and reproduced for social and cultural responsibility, to create and strengthen corporate identity and brand, to create customer relationships, and to produce additional value to the property. The target groups can also vary from business clients to tourists and that affects what and how is presented to visitors. Museums, exhibitions, and corporate architecture connected to company's past are essential instruments when constructing a memory site for company and owners. At the same time, these instruments are utilized to create interesting and magnetic tourist attractions.

In this study, I have examined an old family enterprise. The study shows that especially in family business context cultural heritage can be an integral part of corporate culture and identity. Awareness of history affects the activities of a company and the will to work for own business and future generations (Elo-Pärssinen, 2007). The case study is a typical example of how awareness of history creates responsibility for place and community. The study also shows that when utilizing cultural heritage in tourism it is frequently question of managing changes (Aronsson, 2004). One finding is also that if a company is locally important actor its history culture will shape locality and local cultural heritage. Company's history becomes substantially the history of the local community as well.

Both in tourism studies and in the development of regional and local tourism it should be noticed that companies are significant owners and maintainers of cultural heritage. During recent decades, the company and the works have undergone transformation. Despite the transformation, the company still has local power, especially in deciding how the cultural heritage of the works is utilized. Responsibility to maintain and preserve the traces of the past produces new forms to utilize heritage. Active reuse of cultural heritage is often the best way to assure that the heritage will be preserved.

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## NOTES

<sup>1</sup> The municipality of Noormarkku was established in 1868. In 2010, the municipality of some 6.000 inhabitants was annexed to the town of Pori. Today small-scale industry is locally the main source of livelihood together with the service sector and public administration, and agriculture has a slight importance.

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# The Importance of the Place Name to a Place's Heritage

*Ulla Hakala and Paula Sjöblom*

*Research Note*

**Keywords:** place names; heritage; identity.

## **Abstract**

The purpose of this paper is to introduce a place-heritage framework and discuss the role of the place name in carrying the heritage. To our knowledge, research on the conceptualisation of place heritage is limited. We posit that place heritage comprises four components: place history, place essence, place symbols and residential permanence. The value of the place heritage is constructed as the sum of these four components.

Symbols are integral to the heritage of a place, and of these, the name creates the strongest attachment among residents. The longer the history behind a name, the more meaningful it is in conveying the identity of the place and its people. Contemporary users may sense the historical content of the name, even if they do not specifically know it or consciously think about it. Some current meanings of names arise from the individual emotions embedded in them, and some belong to the folklore. All these meanings accumulate in the place name over the decades and centuries, and are transferred to the next generations.

We found evidence for the importance of the place name and its connection to a place's heritage based on a large survey that we conducted in the South Western Finland. The survey questionnaire was posted to 5,020 randomly selected residents, and the final sample comprised 1,380 recipients. Most respondents attached importance to the name of their home town (Phase 1). Moreover, in order to assess the place-heritage value of each municipality we standardized the original values of the four components of our framework. The final value of a place's heritage was reached by summing these values cumulatively (Phase 2). We then compared the results of Phases 1 and 2. A strong place heritage proved to correlate positively with the perceived importance of the municipality name

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# A Framework for Playing with Heritage: Exploring the Gamified Playground of a Finnish Ski Resort

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*Full Paper*

**Keywords:** sport tourism; cultural heritage; service design; playification; gamification.

## **Abstract**

The purpose of this study is to explore the gamified playground of a ski resort which employs the cultural heritage of snowboard culture in Finland. A winter sport destination is under investigation because the market of winter sport destinations is very specific. The winter tourist is sport and fun-oriented and younger than other tourist groups (Alpine Convention, 2013). This is one motivation to explore winter sport tourism and investigate the implications of new services by playification of the ski slope.

In our study, we have used the design tool Comicubes as a solution prototype which ski resort workers engaged with to create a new gamified and, in this way, playified concept for the target audience of families. The playground of a Finnish ski resort enhanced through gamification and playification offers a value-creating system for the ski resort and its network of actors. The ski resort under scrutiny is a special place for snowboard culture, because it has its origins in this particular ski resort in Finland.

Tourism is a service-intensive industry that aims to create memorable customer experiences. The management and development of a winter ski resort's services is thus of crucial importance to the Finnish tourism industry, as it is becoming increasingly important to create holistic and unique tourism products and packages. In response to these developments, this study aims to understand the opportunities of playification and gamification aspects in association with the creation of new services. In the current study, the ski resort's own cultural heritage of snowboard culture is a unique starting point for service design and offers possibilities to plan a distinguished customer journey in special places at the ski resort, such as the slopes themselves. The study presents the initial stages of planning a gamified customer experience *playground* at a Finnish ski resort by using a three-dimensional design tool to envision the playified and gamified customer experiences within the ski resort.

We propose that future research could make use of our observations made in association of playifying a ski resort through the use of the Comicubes solution prototype developed with local snowboard heritage in mind and using a three-dimensional design tool. Our study represents one of the few studies that has addressed the gamification of a ski resort but also uses the service design tool customer journey concept for developing the highly competitive winter sport tourism industry.

## **Introduction**

With twentieth century affluence, it has become possible to think of all the ways in which we escape from the bonds of work as forms of pleasure. We have come to idealise them: and sports, games, play and toys have all become vehicles for this *idealisation* (Sutton-Smith, 1986).

Renowned play scholar Brian Sutton-Smith notes that in a world that is becoming more play-oriented, sports, games, play and toys all may be perceived as vehicles for ludic (i.e. play-related) escapades. "[T]he ludic turn in Western culture, the shift in sensibility that makes it possible to see contemporary living through the lens of play" (Sutton-Smith, 1997; Henricks, 2017, p. 7) has indeed come to have an effect on how society expects

products and services to cater to this need. The ludification of leisure time means that people are spending more and more time in playful environments, with playful objects and experiences. Ludification functions as an umbrella term under which cultural phenomena and concepts, such as *gamification* and *toyification*,<sup>1</sup> may be considered. The ludification of culture implies that contemporary times have become more play-oriented. This cultural development has not only become apparent in the realm of otherwise ludic areas of human life such as leisure and tourism, but also in the context of education and professional life. In other words, the play worlds of Western civilisations have expanded, as have the technological possibilities that allow us to become engaged with various activities of both solitary and social play, anytime and anywhere.

Play scholar Roger Caillois (1961), in his classification of games, defined a continuum between rule-bound and structured “*ludus*” and more free-form and spontaneous “*paidia*”. The concept of playification is oriented towards the less rule-bound and more open-ended (or casual) forms of play. Thus, playification means that casual game design elements have been selected. In this case study, we explore a ski resort as a casually gamified playground.

One of the most prominent examples of the playification of Lappish tourism undoubtedly has to do with Santa Claus. Playification of Finnish Lapland is also apparent in technological applications, such as the Northern Lights Forecast & Aurora Borealis Alerts (Northern Lights Forecast & Aurora Borealis Alerts app by Letovaltsev Maxim). However, our goal is to create more gamified uses of cultural heritage, such as our case example of the gamified ski resort in Northern Finland. We begin by exploring the cultural heritage of snowboard culture, continue with a discussion of the gamification of tourism and finally present how the ski resort representing our case study has undergone the process of gamification.

The term “gamification” was popularised by Zicherman and Cunningham (2011). Gamification as a term, originated in the digital media industry. Gamification explores game design elements in non-game contexts (Deterding et al., 2011). Therefore, the definition of gamification is still in the conceptualisation process, with methodological differences and pursuit of academic validation (Hamari et al., 2014). However, research has expanded and, at the same time, there is a trend in the context of education, where gamification is seen as a beneficial tool to engage students in different subjects. Gamification is also a significant and emerging business practice, which the world’s top companies are already using in various contexts.

### Cultural heritage of snowboarding culture

Cultural heritage is the result of representations of identity and the workings of collective memory in respect to the identity of a particular culture in question. Cultural heritage may be seen as a result of collective practice that is considered to be worth preserving, at times using history as both a commodity and a product. In the specific context of snowboarding, cultural heritage may be deliberately cultivated through the documentation and representation of cultural heritage using, producing and employing representations of skiing and snowboarding culture in the playified contexts. Games using cultural heritage may be considered as *artefacts* (Aronsson, 2004). For example, game-related experiences such as *Revolution* (Francis, 2006) and the *Virtual Egyptian Temple* (Jacobson et al., 2009), which exist within a cultural heritage context, reveal the potential of gamification and virtual technologies to engage and motivate their users to participate in leisure time activities beyond the traditional tourism context.

We begin with a brief overview of snowboarding and its cultural heritage. Snowboarding offers an interesting point of departure to investigate cultural heritage as a historically oriented body of knowledge about a subculture and its original context of operation that may be used when gamifying a tourist experience in relation to a ski resort. For tourists visiting a ski resort, it may be interesting to explore the roots of this culture within the context of the actual slopes where this sport is said to have begun.

<sup>1</sup> Toyification, as defined by the second author, communicates the idea of an entity (either physical, digital or hybrid) being intentionally reinforced with toyish elements or dimensions: an object, a structure, an application, a character or a technology acquiring a toyish appearance, form or function. In parallel to the gamification of everyday life, it is possible to trace simultaneously occurring patterns of toyification taking place in different cultural realms.

Snowboarders defy gravity, and defy the rules in their daring tricks that provide the ultimate image of freedom. The common image associated with snowboarding and rebellious skiers was part of the ‘neon phase’ and wearing the ‘extreme look’ of the 1980s (Binsted, 2004). While the ethos of the sport dictated individualism, a pervasive, dynamic and distinct snowboard image evolved. Initially, both skiers and snowboarders possessed visually similar appearances. Styles reflected the popular trends observed outside of the sport and often snowboarding apparel was not commercially available. During this period of development, snowboarding was not about status, because to be a snowboarder itself did not possess a defined image. Within a few years after snowboarders arrived on the ski hills, they rejected the fashionable, extreme image and aligned themselves with the emerging alternative culture. The new snowboard image drew from a range of symbols associated with expressions of snowboarders’ virtues, values and interests. Fashion, equipment and lifestyle choices defined what was ‘cool’, thus fostering group cohesion and recognition. Snowboarding has always been a “commodity-oriented subculture” in which the pledging of allegiance to snowboard companies through purchase and wear requires the company to possess a genuine corporate philosophy that aligns with the snowboarder ethos (Popovic, 2009). The unique—and, at the same time, collective— nature of heritage resources means that such attractions may be developed into a “special” niche in the industry, such as the gamification of a ski resort with a focus on snowboard culture.

### Literature Review: Tourism and Gamification

Tourism is an experience industry (Pine & Gilmore, 2011) that is increasingly based on co-creating personalised services. In tourism, business will always need service design to recognise the changing customer’s needs as tourism services sell multidimensional experiences to customers. New phenomena and technologies, such as gamification, smartphones and social media, provide tools to develop such experiences. Indeed, the tourism industry has always been one of the first to engage new initiatives (Buhalis & Law, 2008). Games can provide a new and powerful way to interact and engage in a fun and rewarding way. Gamification has emerged as a useful marketing tool for tourism organisations to be used to offer dynamic engagement to users. Gamification has become a new approach to promote tourism destinations; gaming provides tourism marketers with an opportunity to create informative and entertaining settings for successful brand awareness, interactions and communication (Xu, Buhalis, Weber, & Zhang, 2015). The use of games in the tourism industry may potentially provide marketing opportunities. According to the World Travel Market Report (2011), gamification is a major trend in tourism that will appeal to consumers across all age demographics. The current use of gaming by the tourism industry can be divided into two types, described in the following. Moreover, as suggested in this paper, the gamification of tourism may be approached through a third type - the conceptual framework of the *playground*, which we consider to be the third alternative:

- 1) *Social games* (play before you are there), based on social media such as Facebook. These games are primarily used to build brand awareness, attract potential customers, and build up a destination or a company image. Examples can be found in Thailand (Smile Land Game, 2012), South Africa (The Real Time Report, 2012), Ireland (Tourism Ireland, 2011) and Nanjing, China (People, 2013).
- 2) *Location-based mobile games* are mainly used to encourage more engagement on-site in order to enhance tourist experience in a more enjoyable way (Waltz & Ballagas, 2007). Most existing tourism destination games are based on the game principle of the classic treasure hunt. For example, REXplorer aims to persuade tourists to explore and enjoy the history of the United Nations Educational, Scientific and Cultural Organisation (UNESCO) world heritage city of Regensburg, Germany (Walz & Ballagas, 2007).
- 3) The concept of *the playground* is site-specific and location-based. The playground has been used to encourage playification (a more casual form of gamification), creative engagement and enjoyment, and to develop the tourist experience into a more creative and fun way to experience the ski resort. Game design elements are not only important to engage customers with the destination, but also to enhance an important, new marketing tool that provides entertainment in order to make an

emotional connection between the playground-based game and the destination (gamified ski resort).

Rather than artefacts, this paper describes a location-based tourist experience, playified for its users through the conceptual framework of gamification. In order to understand how a tourist service, such as a ski resort, may be gamified, a theoretical framework of the motivational components is needed. Klapztein and Cipolla (2016) provide an extensive review of game design’s motivational concepts, which are grouped into seven game activity components: *voluntariness, rules, control, objective, feedback, social interaction* and *perception*. Voluntary participation can be stimulated by presenting clear objectives, adding social competition and collaboration, and generating multiple (emotional, social and virtual) rewards; game rules should be designed to foster pleasure, enabling users to put energy into activities that they like to do (McGonigal, 2011). Users must be able to perform the activity requirements, so control options must be compatible with their skills, abilities and wishes (Csikszentmihalyi, 1991). Game objectives can be divided into short (step by step) or long-term goals (final/main game conditions), which are proposed by the user (self-challenge) or by the game system (predefined default goals) (Salen & Zimmerman, 2004). The concept of achievement best combines objective with feedback, providing well-defined goals that, when attained, rewards users with prizes that they can use and display (Hamari & Eranti, 2011). Social interaction feature (influence, recognition, network exposure and attitude) can enhance social influence and the perception of social benefits, and are essential in the creation of socially engaging services (Hamari & Koivisto, 2013).

Game dynamics and mechanics are related to the perception component: status, self-expression, gift exchange and charity (Bunchball, 2010; Bunchball, 2011). Motivational components that relate to the gamified playground of a ski resort are synthesised and presented below (see Table 1), Here, we build on Klapztein and Cipolla’s synthesis of game design concepts (2016) by using concepts derived from new play theory: namely, Wow, Flow, Double-wow and Glow (Heljakka, 2013).

Table 1. Synthesis of motivational factors of the gamified location-based playground of the ski resort, based on Klapztein and Cipolla (2016) and further developed by the authors.

Motivational components	Key Concept	Customer Perspective	Engagement	Reward	Rules and mechanics
<b>WOW</b>	The user of the gamified playground must become enthralled by the offered service.	Wow is an unexpected, but pleasant, experience for the customer.	The person who wants to design for Wow should design a product or service that is seen as unexpected, unfamiliar, engaging and fit for the services.	The Wow experience gives the participant a reward at the first encounter and offers more than expected.	Game mechanics need to have a Wow element to offer the customer.
<b>Voluntariness</b>	Voluntary participation requires that the player is willing to play the game-based on a ski slope activity.	Activities are set in motion through customer participation. Involved voluntary activities triggers people’s interest.	The more pleasurable an activity and the more choices available, the more engaging the activity can become.	Activities must be attractive and intrinsically rewarding; participation must also be designed as a reward in itself.	Voluntary action is driven by clear goals, social interaction and multiple rewards.



<b>Rules</b>	Activities need to support the participant's own goals, pleasures and rewards. Some rules are derived from general action on the ski slope.	Customer experience and engagement can be positively influenced by meaningful use of technology.	Game rules must be designed to foster pleasurable activities that customers like to perform.	Fun and reward increases with well-defined rules and game mechanics.	Rules can control and ritualise customer activities, positively affecting their experiences.
<b>FLOW</b>	<b>Flow identifies the most important drivers as flow experiences and provide a set of these features of each driver.</b>	<b>When a customer is in a flow state, the person becomes completely involved in an activity and experiences a number of positive experiential characteristics.</b>	<b>The state of Flow influences customers' exploratory behaviours and engages them in the services.</b>	<b>Flow rewards the customers when they fully concentrate on the experience without considering time.</b>	<b>One of the key element of game mechanics is to help a customer into an immersive state that can fulfil customers' needs for multifaceted experiences.</b>
<b>Control</b>	Customers must feel in control over the performed activities.	Activity demands must be compatible with customer abilities and wishes.	The more customers are focused on an activity, the more involved and motivated they are.	Activities should be designed as learning experiences provided through pleasurable actions on the gamified ski slope.	Control over activities must be dynamic and slightly uncertain, requiring constant attention.
<b>Objective</b>	Goals can strongly influence user interest, commitment and desire.	Objectives must be clearly defined and easily understood.	The reasons for doing a task influence customer pleasure.	Goal achievement is the game design element that most often generates user pleasure.	Objectives include short and long-term goals, as well as personal or system-proposed goals. Objective mechanics include achievements and challenges.
<b>Feedback</b>	Feedback must be given in real time (if the customer uses a mobile phone), and must be frequent and clear.	Users must always be aware of their action options and the potential rewards.	Uncertainty, curiosity and surprise are powerful motivational elements, which customer feedback will show.	Rewards elements are key factors to motivate players.	Feedback mechanics include points, levels, scores, gifts, rewards and status.
<b>Social interaction</b>	Emotions in a social context, such as ski resort activities, are generally more intense and pleasurable.	Certain emotions may arise only through social interaction. Competition against real users is almost always more engaging than against virtual ones.	The possibility of engaging in a collective freedom of self-expression and experiencing new situations are strong motivational aspects.	Social interactions are critical for pleasure and engagement in game-based activities.	Providing different ways to communicate and express oneself promotes interaction with others. Social game mechanics include collaboration, competitiveness, and varied expression.

<b>DOUBLE-WOW</b>	Double-Wow provides a way of understanding how the customer who already has experienced a Wow experience with the service perceives something unexpected.	Double-Wow means that a plaything or playified service, once employed in play, reveals a hidden feature which extends the 'wowness' of the artefact beyond the first encounter and wows the user again.	Double-Wow could mean a surprise encountered during the active use of the service and engagement with the service, which gives the user a secondary Wow experience.	Double-Wow gives rewarding experiences to the customer when the experience is a surprise.	Game mechanics can use the Double-Wow element to extend the customer experiences and encourage them to use the service again and again.
<b>Perception</b>	In game-based experiences such as location-based experiences, the focus should be on entertainment and pleasure.	Activities should make users feel like they are integrated in a game environment: in this case, the ski slope environment.	Motivation should be stimulated by positive experience and customer desire to participate in successful and meaningful ways.	Context and reason for doing an activity are fundamental to the generation of pleasure.	Common positive emotions in game activities include surprise, fun and pleasure. Perception mechanics include self-expression, status, gifts and charity.
<b>GLOW</b>	Glow refers to user-generated value creation in reference to a material artefact or tourism service. For instance, when players have creatively cultivated a plaything or a service in a creative and productive way, they have given it an added value, namely Glow.	Glow gives customers extended value for services with which they have had a pleasurable experience before.	Glow compares the customers' experiences to what they have experienced before and gives them a pleasant memory of that they want to re-experience. This means that the customer who has engaged with the service wants to come back again and again.	Glow may refer to a lived experience that the customer has personally experienced: for example, the creation and social sharing of personal content to get rewards.	Game mechanics invite users to create content, which extend game experiences beyond the original offerings.

### Research Design

This research is explorative as it investigates a new and emerging area. It aims to explore how playification can be used in a ski resort context and how consumers can benefit from a gamified playground built on snowboard culture in a specific destination. Since this is a new area of research, it needs to be explored in depth; thus, qualitative research paradigms are used. Focus groups were carefully selected from the marketing and product development departments (five participants in total). As a qualitative research method, focus groups emphasise group discussions and group interactions, as well as share and compare individual experiences among the participants (Marshall & Rossman, 2006). The focus group method is usually used for topics that are not well understood in order to discover new insights. This paper aims to explore the new topic of a playified of ski resort. As an exploratory study of the emerging area of gamification in a tourism context, representation of the sample as part of the population is not a major concern because the method aims to explore the dimensions and create constructs rather than measure variables and representation. A larger-scale quantitative study will be used in future stages of this project with actual customers.

Gamification is an extremely popular subject in contexts where it benefits from customer engagement, such as tourism destinations. In this study, the staff of a ski resort's marketing and development departments were chosen based on the following considerations:

1. The staff is familiar with the local heritage of snowboard culture, which differentiates this facility from other Finnish ski resorts. The participants also represent the target audience of the gamified ski resort. The study participants are all male and aged between 30 and 40 years of age. The new service, "Turn the Ski Slope into a Game", targets this demographic through the ability to enjoy the skiing while playing the game with their mobile phone by moving on the slopes and interacting with the game.
2. The staff's age group also represents the primary age group that plays mobile games, as suggested by many game researchers. The people who play mobile games are those in the 25 to 45 years age groups.

### **Prototype Solution: Comicubes**

The Comicubes tool is both a service design method and a solution prototype with many concepts that provide solutions to gamify a ski resort. We suggest that Comicubes could be used as a basis for creating performance-based prototypes. Comicubes function as a platform with which participants can engage freely and thus exhibit the key behaviours of customers at a gamified ski resort, in order to understand the envisioned experience. We have used the Comicubes prototyping tool in designing enhancements to the customer journey. The Comicubes concept is a creative prototyping tool - a hybrid that combines images with a simple, physical, three-dimensional paper technology. Hybridity means that the cardboard cubes, as physical material, also have a digital layer or include digital elements. Hybridity may occur in many ways in both a plaything and in prototyping. For example, Comicubes can utilise digital layers with Quick Response (QR) codes, which provide enhanced sounds, images or video material (Heljakka & Ihamäki, 2016).

We describe the Comicubes solution prototype as a method in which users are observed engaging in planned activities around prototypes of proposed solutions. There are two types of solutions prototypes used in this method: 1) Appearance Prototype, which simulates the appearance of the intended offerings; and 2) Performance Prototype, which primarily simulates the functions of the intended offerings. Through the observation of these prototypes, user experiences validate or invalidate assumptions about proposed solutions (Kumar, 2013, p. 273). In our study, the Comicubes solution prototypes were tested and validated in a simulated environment of a Finnish ski resort area. Information was gathered through observing the participants' interaction with the prototypes, and was recorded with video and still photography. The observations were then analysed to understand the designed customer experiences and the impact they might have on proposed solutions (Ihamäki & Heljakka, 2017).

We tested the Comicubes solution prototype during a building session in which five people participated. The participants were responsible for the ski resort's services and their service design. We started the prototyping session by explaining the theories behind service design, customer journeys, and gamification. After this, we introduced the Comicubes tool, including four blank cardboard cubes, from which the participants were asked to create the customer journey for the ski resort area. Our focus groups used the Comicubes tool to create the customer journey through storytelling. They also made physical prototypes of the game in the ski resort, in which they designed activities familiar from game play. The session took 4 hours; on the next day, we recorded and analysed the developed customer journeys and redesigned the customer journey of the ski resort further (Ihamäki & Heljakka, 2017).

### **Case Study**

This case study describes the enhancement of customer engagement by exploring the gamified location-based playground ski slope in combination with the Comicubes solution prototype. The ski resort's aim is to get customers to try new (gamified) services. In this case study, we have named the ski resort service created

in the workshop as “the slope game”. The concept targets families who want to gamify their skiing holidays. This is a unique concept planned for a Finnish ski resort that does not yet have similar products or services to offer. The goal is to develop a story that leads the customer through the skiing environment and completing tasks: for example, taking pictures and sharing them on the ski resort’s screen (Ihamäki & Heljakka, 2017).

The study was carried out at a single Finnish ski resort with participants that included a marketing manager, a game developer and a development manager. All are professional snowboarders and skiers. In Finland, ski resorts offer many services and winter fun in Lappish (Northern Finland) settings. Customers enjoy well-maintained slopes, efficient ski lifts and stunning views. In the resort we selected, the ski season lasts more than 200 days. The multifaceted ski area is suited for children, adults, beginners and experts. In our case study, the ski resort hopes to enhance its service design through gamification and make the resort more inviting for their customers. In order to participate in the focus group, respondents had to meet the following criteria: 1) currently uses a smartphone, 2) plays mobile games, and 3) works in the ski resort. Five people participated in the workshop. The workshop was conducted in January 2017, including two sessions during two days. The workshop started with a one-hour introduction that discussed service design, the customer journey, gamification, game design, and a sample of geocaching locations. The participants were assigned to one of two teams, each of which designed their own customer journeys with the Comicubes ideation tool. Both authors documented the group interaction, including non-verbal communication, by recording the working of both groups on video. Data was analysed using thematic analysis (Marshall & Rossman, 2006). During the recording of videos, we interviewed the respondents about their gamified ideas of the ski resort using the Comicubes method. As both an ideation and prototyping tool and a method, especially to describe the customer journey at a gamified ski resort, the Comicubes fits service design purposes well. Interaction between the two groups showed that they helped each other to create unique experiences at the gamified ski resort, which was a key goal for the participants.

## Results

“...where does one play? On a playground. In its customary sense, *playground* refers to a recreational area, usually outdoors, expressly defined for children’s play. But in a metaphorical sense, *playground* describes the place where play takes place, no matter the type of play” (Bogost, 2016, p. 20).

The ski slope system functions as a setting for play, not unlike a game board or playground of sorts, as described by Bogost (2016). The physical space—the landscape of the tundra turned into the gaming system resembling a ‘board game’ through ski lifts and maintained ski slopes—offers itself as a site for active exploration of its terrains and the flow of downhill skiing or snowboarding down its slopes. As a gamified experience, the ski resort turns into a place where playing with heritage is enabled through a combination of a mobile app and specific hotspots connected to the system of ski lifts and slopes. The workshop results, as illustrated in our case study, allow the game’s participants to immerse themselves in both contest and creative play, a familiar element of snowboarding culture.

The concept of gamification can be used successfully by encouraging customers to participate in activities, for example to find treasures in ski resort area. This makes the customer’s skiing holiday more meaningful and at the same time engage the customer more in ski resort activities. Through gamification of the ski resort, the providers of the experience are able, to a certain extent, to control the movements of their customers, that is, the users/players of the gamified service. Furthermore, it allows them to guide the users/players to spend a certain amount of time in particular locations on the slope and off-piste.



Figure 1. Comicubes solution prototype 3: A 3D visualisation of the gamified customer journey at a ski resort.

## Discussion

Gamification of the ski resort, with its slopes and lift system, adds a new, playful dimension to the tourism experience. By encouraging the users of the ski resort to engage with the physical surroundings of the site, the resort as the provider of a gamified service also offers its users/players the possibility to become more cognitively engaged with the cultural history and heritage of the place. Through the concept of gamification, the ski tourist is presented with the framework of a game to become more knowledgeable about the ski resort's connection to the evolution of snowboarding culture. This is done by inviting the users to play a game: for example, answering trivia questions or trying to locate specific spots on the slopes (in the manner of a treasure hunt or geocaching, which uses coordinates) to either learn about present or historical events in these particular places, or to challenge themselves in trying tricks, participating in games of skill or taking part in creative activities such as creating stories about fictional characters (e.g. snow-covered trees that remind them of something else) or playful photography (e.g. *photoplay* - photographing toys in anthropomorphised situations).

## Theoretical Implications

In this paper, we have presented a new strategy for the gamification of tourism. The strategy introduced in the paper is called a gamified location-based playground, which includes motivational components of casually-oriented gamification, or playification. The suggested framework is useful when creating, specifying and structuring a gamified location-based playground, making the design process more controllable (Koivisto, 2009). In order to synthesise the gamified location-based playground ski resort as a framework for service designers, tourism developers, researchers and game designers, its application was combined with the Comicubes tool, which allows a more controlled analysis of the service through each stage/touchpoint, and targets better control over the results (the desired customer experience). This work is at its initial stage, because service and game designers are not supposed to (and are not able to) design customer experiences directly. They can only design, indirectly, the elements through which these experiences can occur (Forlizzi & Ford, 2000; Salen & Zimmerman, 2004). Users themselves co-create unique experiences through their interaction across all touchpoints (Patricio et al., 2011) and the application of the gamified location-based playground ski resort is proposed as a resource to help to define the desired aspects of the gamified ski slope service experience.

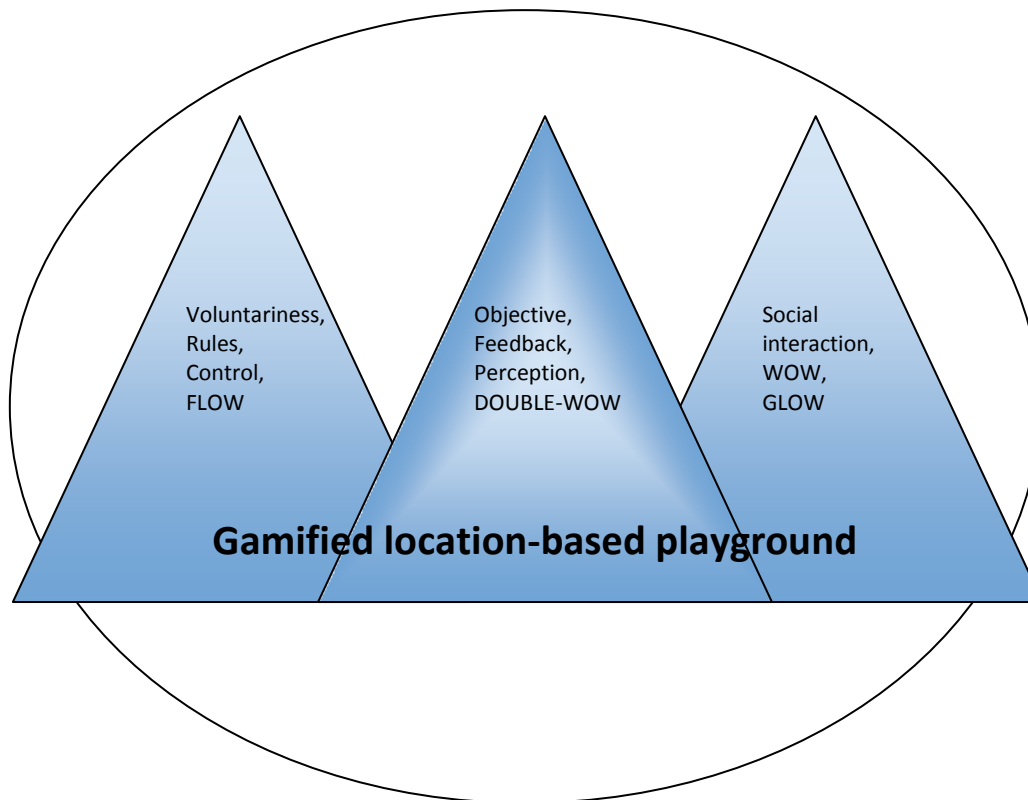


Figure 2. Framework for understanding the motivational factors in a gamified location-based playground at a ski resort.

### Conclusion

This paper provides a conceptual framework of using playification (or a casual type of gamification) in a ski resort to create new service development. The paper discusses game mechanisms that are applicable in the tourism industry. In order to exemplify the implementation of the gamified location-based playground framework, Comicubes present a solution prototype that helps ski resort staff to enhance the customer journey through gamification. The gamification of the customer journey makes it possible to manipulate, identify, stimulate and evocate—and in this way, enhance—the customer journey and invite the customer to enjoy and engage more playfully with the ski resort. The gamification of a ski resort provides its users multiple possibilities to play in not only a unique, natural setting, but with the cultural heritage of skiers and snowboarders past and present. The case study presented in the paper suggests that, by using the theoretical framework of motivational factors related to gamification together with a solution prototype and ideation tool like Comicubes, it is possible to envision how a previously less ludic tourism service might be playified by adding casual gameful elements to the provided service and to offer the users not only a ‘game board’, but a whole playground where both competitive and creative play can flourish.

Further, we propose that the (sport) tourism industry could benefit from a stronger focus on ludic experiences: not only as a provider of these products and services, but also as a dedicated design partner co-developing play(ful) activities through playification of their existing or future offerings with others involved in the creative and experience industries, such as game and toy companies.

“Life, it seems, always becomes more exciting when the hope of play exists”  
(Sutton-Smith, 2017, p. 148)

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# Linkages Between Film Commissions and Production Companies: Towards a Win-Win Local Development Strategy

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*Research Note*

**Keywords:** film industry; film commission; public incentives; place narratives; tourism.

## **Abstract**

National, regional and urban policies across Europe have ramped up efforts to attract film and television productions through direct and indirect subsidies that provide filmmakers with assistance during filming and financial support to finance their productions. To better understand the role of film commissions concerning the impact of the domains of finance, policy, human capital and cultural environment on the development of local film industry, the entrepreneurial ecosystem model was applied to investigate two North Italian cities, Bolzano and Trento. Findings illuminate why short term economic benefits might undermine long-term development of the local film industry and which steps are needed to elaborate a win-win strategy.

## **Introduction**

The growth of the film industry has helped to shift some cities from the industrial into the post-industrial age (Bassett, Griffiths, & Smith, 2002), exploiting both urban culture and human capital skills. Policy makers – whose objectives are place and tourist marketing (Busby & Klug, 2001) - have supported the film industry in the repositioning and rebranding of cities (Kovács & Musterd, 2013). How these domains shape an entrepreneurial ecosystem (Isenberg, 2011) based around the film industry needs to be understood in order to define successful urban development strategies. The cases of Trento and Bolzano, the capitals of two autonomous provinces in Northern Italy, Trentino and South Tyrol, are used to shed light on these issues.

## **Theoretical Background**

In the debate on urban planning (Pratt & Hutton, 2013), the film industry has been recognized as a source of development, regeneration and innovation (Johns, 2010). Urban tourism stimulates such transformations, and also captures their value, thus also changing the urban identity and its narratives (Richards, 2014). A number of domains are involved in, and influence, the evolutionary trajectories of a film industry's entrepreneurial ecosystem (Cohen, 2006; Isenberg, 2011; Ormerond, 1998). Policy, finance, human capital and culture play a critical role as high financial risk and uncertainties are endemic in the film industry (Morawetz et al., 2007), which is knowledge-intensive (Clydesdale, 2014), and connected to place-specific resources. Policy makers mitigate these risks and uncertainties by subsidizing film productions and/or by creating and funding film commissions. The expected return is the development of the film industry (Bathelt & Boggs, 2003; Coe, 2000), job opportunities (Christopherson & Righthor, 2010; Coe, 2000) and the embedding of place assets in film productions (Bathelt & Boggs, 2003; Coe, 2000). The higher the value of urban culture in terms of resources (natural, cultural, architectural, creative) and locations, the more effective the construction of place narratives through film, for place and tourism marketing will be (Hudson & Ritchie, 2006). However, tax incentives and subsidies have dramatically increased the competition between cities to attract big budget film productions, thereby increasing the divide between local and international film producers (Alfred & Lambert, 2012; Clydesdale, 2014; Christopherson, 2003). Highly specialized skills are needed to survive this competition and to operate on flexible, project-based work (Christopherson, 2004).

## Case Study and Methodology

Trentino (pop. 534,405) and South Tyrol (pop. 511,750), have become increasingly popular film production locations. This growth is manifest in an increase in the number of local companies, the diversification of production and postproduction activities along the film-value chain, and the quality of specialized location services. Both national and international film productions have been attracted to the two areas, and more than 150 productions have been made in each province. A multiple-case study design (Yin, 2014) was deemed suitable to investigate how the domains of finance, human capital and culture shape the film industry's entrepreneurial ecosystem. The two provinces have considerable autonomy in policy decision making due to their special status in Italian law; host the youngest film commissions in Italy, founded in Bolzano in 2010 and in Trento in 2011; and are among the most competitive tourism provinces in Italy, with natural resources playing a crucial role in destination image-making and branding (Cracolici & Nijkamp, 2006).

The case study has two phases:

1. *The research design*, which grounds the empirical analysis, is based on the adaptation of Isenberg's (2011) entrepreneurial ecosystem model to the film industry and focuses on the domains of finance, human capital and culture.
2. *The collection of case evidence*, which was carried out between October 2016 and February 2017, through the qualitative analysis of multiple sources. In-depth interviews were administered to representatives of the political, entrepreneurial and education film worlds in the two cities: eight local production and service companies (representing all the actors in the film industry's entrepreneurial ecosystem) and three policy makers in Trento; three production companies, one policy maker and the film school (which serves both provinces) in Bolzano. Our questions investigated the domains of finance, human capital and culture, focusing on the film commissions' funding guidelines and the impact they were having; entrepreneurs' capacities (built through training provided by both the film commissions and the film school); the construction of narratives of place through film production. Information collected through interviews was integrated with secondary data provided in official reports on the local culture industries and archival records published by the film commissions. The triangulation of data sources and types provides robust and reliable empirical evidence.

## Findings

Interaction between the domains of finance, human capital and culture has shaped the film industry's entrepreneurial ecosystem in similar ways in the two cases examined.

*Public incentives* have been regular - higher in Bolzano than in Trento - and have had both positive and negative impacts on the local film industries. Bolzano provides/has been providing an annual subsidy of 5 million euros to film producers operating in the province; Trento 1 million per year. Local and foreign film productions have benefited unconditionally from these incentives. The two criteria followed in public financing – film companies must spend at least 150% of the allocated subsidy in the local economy and are required to embed place assets in productions – have had multiplicative effects on the supply chain which serves film productions, directly and indirectly. Place narratives embedded in the film productions were expected to strengthen place image and brand and to increase visitor flows; successful TV series have proved this correlation to be positive. The film productions' expected positive impact on the local economy was given more weight than enhancing of place narratives in deciding on subsidy allocation, thus benefiting big budget external productions more than small local companies. Local companies are further disadvantaged by the fact that subsidies are only paid post-production after filming. As distribution agreements are reached when a production is at an advanced stage, big budget productions have an advantage over small local enterprises because they already have well-established distribution networks. *Public policy* has also played a critical role in increasing the technical and creative skills of local film entrepreneurs. The film school, key to capacity building in documentary making at the international level for both provinces, is publicly financed.

The film commissions provide training (courses and workshops with experts); subsidize film festival tickets for local residents; and fund trips abroad for specialized training. In Bolzano, talented locals (with some experience) also benefit from mentoring programmes to develop their skills in the field. However, big budget productions from outside tend to be the main beneficiaries of these training initiatives, as they are best placed to take advantage of the highly qualified human capital and specialized services provided. Moreover, external production companies provide local production companies with limited opportunities to grow professionally because they are not obliged to employ local crew or use local talent.

### **Conclusion, Limitation and Practical Implications**

The adaptation of Isenberg's (2011) entrepreneurial ecosystem model to the film industry has proved effective in interpreting the cases examined. In both cities, the domains of finance, human capital and culture have both bright and dark sides. Short term economic benefits seem to be prioritized in the public incentivizing/subsidizing of the film industry. Big budget productions benefit most, since their international distribution networks mean that they generate bigger multiplicative effects and provide greater place visibility when their productions include place assets/values. Skills capacity building supported (directly and indirectly) by public resources has increased the local film industry's specialized skill base but policy makers approach is still short-sighted. High quality skills are not capitalized on, either to foster local entrepreneurship, or to train local talents to apply for EU funds (Creative Europe Program). Significant differences between Trento and Bolzano were observed in this regard: Bolzano seems to have a long-term vision which builds on the competitiveness of the local film industry and the nurturing of local talent.

Although these results are exploratory, they enable some preliminary practical and managerial considerations. The public policy aimed at attracting foreign film productions is necessary but not sufficient to foster the development of a local film entrepreneurial ecosystem. Public incentives should be better designed and complemented by other policies and actions aimed at supporting local firms and strengthening local entrepreneurship, talent, and place marketing. Additional criteria related to the employment of local crew and talent by any company benefiting from subsidies should be set; the subsidy should be supplied in tranches during the filming process to allow local producers to develop their distribution networks. Collaboration between production companies and Destination Marketing Organisations (and/or other territorial bodies) throughout the pre-during-post production phases should help to create and manage effective place narratives and visual storytelling and communicate these, in order to strengthen both place and tourist marketing and stakeholder engagement. Further research is needed to overcome the limits of this exploratory study. Other representatives of the film entrepreneurial ecosystem of Trento and Bolzano should be included in the analysis (e.g. tourism). Comparative analysis with other Italian and European regions where Film Commissions have been created should also be carried out.

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# Life in Lapland - Shareable Local Experiences

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*Research Note*

**Keywords:** shareable tourism; narrative; authenticity; Lapland; local lifestyle; product development.

## **Abstract**

Local everyday life is an interesting resource for tourism. This fact has been noted in various national and regional strategic guidelines. Lappish culture, heritage, nature and their narratives offer unique possibilities for tourism development. The global trend of the sharing economy—a new marketing practice that links consumers, business and society through virtual networks—offers various possibilities to bring the features of local lifestyles to tourists. House swapping, ride sharing, ‘couchsurfing’ and dinner hosting are examples of ways to actualise the sharing economy in tourism. In Lapland, these kinds of sharing practices have traditionally been part of the hospitality culture: due to long distances and harsh weather conditions, locals have offered travellers a ride or bed when it has been necessary.

Although everyday life provides a remarkable resource for tourism, reconciling the business of tourism and everyday practices is not a simple task. It is not obvious for tourism developers what is essential and relevant in local culture to be presented in tourism products, or how to do it. In this set of research notes, we present a preliminary analysis of several short Lappish stories reflecting and emphasising the local lifestyle of Lapland. These narratives are being collected by House of Lapland, Lapland’s official marketing and communications house. In their campaign, the stories were shared through different social media channels. Written by local people, the narratives highlight ordinary aspects of everyday life in Lapland that may be attractive for potential inhabitants. These highlights may also suggest potential innovations for visitor experience development and for the sharing economy in tourism.

Social responsibility is a key issue that has to be taken into consideration when developing tourism experiences based on the sharing economy. In some European cities, sharing economy tourism services have grown explosively without sustainable planning, causing problems in local communities. The use of narratives written by local people to potential new locals as a basis for sharing economy tourism sustains social responsibility. Narratives can reveal what kinds of things locals want to share from their everyday life, as well as elements that should be protected.

## **Introduction**

Local everyday life is an interesting resource for tourism. Travellers are looking for authentic experiences. The paradox is that real lives are lived backstage, rather than onstage (MacCannell, 1999). In coming decades, people's focus will shift from material to spiritual needs, from technology and science to emotions and storytelling. Companies have reached a new frontier—the realm of imagination, emotions and dreams (Jensen, 1999). John Urry states that the ‘tourist gaze’ is constantly searching for authenticity (1990). Consumers participating in tourism experiences can perceive authenticity on various levels. The experience of authenticity is, in its core, subjective and, thus, a projection of an individual’s own beliefs onto a service encounter (Wang, 1999, pp. 349–370). Nonetheless, according to Wang (1999, p. 351), MacCannell (1973) introduces the concept of a so-called staged authenticity. In other words, services or commodities appear authentic because of the way they are constructed.

The quest for real life experience has been noted in various national and regional strategic guidelines. The global trend of the sharing economy offers various possibilities to bring the features of local lifestyles to

tourists (e.g., Kyyrä, Rantala, Posio, & Rahikainen, 2016). It enables temporary access to local services, products and everyday life (Belk, 2014, p. 1595). Traditional capitalism is based on buying, selling and renting transactions between companies and consumers. The sharing economy, on the other hand, is defined as a new marketing practice that links consumers, business and society through virtual networks, and this is the most common term to describe a business model based on sharing (Bardhi & Eckhardt, 2012; Belk, 2014; Botsman, 2013; Hakkarainen & Jutila, 2017). However, there has been a lot of discussion about the paradox in the sharing economy: how sharing can be considered as economy and how commercial action can be sharing (e.g., Arnould & Rose, 2016; Belk, 2010, 2014; Hakkarainen & Jutila, 2017). Similar terms are collaborative economy, peer economy, peer-to-peer consumption and access-based economy. If sharing is understood as a form of activity, not as a description of non-monetary consumption, it is arguable to use the term *sharing economy*. In tourism, the sharing economy emphasises individual experiences, along with a sense of communality and belonging (e.g., Bock, 2015; Hakkarainen, Jutila, & Nuottila, 2017).

Home accommodation, ride sharing, dinner hosting and tours conducted by locals are examples of different forms of actualising the sharing economy in tourism. In Lapland, these kinds of sharing practices have traditionally been a part of the hospitality culture: due to the long distances and harsh weather conditions, locals have offered travellers rides or beds when it has been necessary. In Lapland, current sharing economy services are highly focused on accommodations, mainly on Airbnb and Couchsurfing. Especially in the Rovaniemi region, Airbnb accommodation has grown explosively. There is also a growing business interest in developing different kinds of mobility services. Pilot projects have been conducted in the Ylläs region. The potential for many kinds of sharing economy based tourism services is huge. Many features of ordinary local life in Lapland are attractive tourist experiences, especially for tourists from big cities. The people of the north, their heritage and culture, unspoiled nature (flora, fauna and natural phenomena) and the skills of surviving in the Arctic environment offer unusual resources for tourism. There are many opportunities to develop tourism products and experiences related to exploring the simple and authentic lifestyle of Lapland.

In this set of research notes, we present a preliminary analysis of 50 short Lappish stories reflecting and emphasising the local lifestyle in Lapland. Written by local people, the stories highlight the ordinary aspects of everyday life in Lapland that may be attractive for potential inhabitants. These highlights may also suggest potential innovations for visitor experience development in tourism. For some tourists, the contemporary Lappish lifestyle may not be as familiar as reflections of traditional life, which might actually be based on stereotypes. For some, the local lifestyle in Lapland may be associated with traditional Sami huts and dresses, even though the Sami people are only a small minority in Lapland and very much integrated into the main culture. In this research, we concentrate on the content of the stories, without knowing the ethnic background of the writers. When the ordinary aspects of everyday life are taken into consideration in product development, realistic expectations of authentic Lapland may be strengthened.

## Research Design

This research is being conducted in the ERDF project called 'Shareable Tourism' (Jakamistalous matkailussa, EAKR). The objective of the project is to identify the present situation and future prospects of the sharing economy in general and the forms of the sharing economy in Lapland related to the tourism business. The second objective of the project is to find out the possibilities and challenges of using everyday life and everyday practices in tourism related sharing economy and to find possible solutions for product development.

For its part, this research aims to address the latter objective of the Shareable Tourism project by examining stories written by local people. Critical close reading and content analysis are used as analysis methods. Our main task is to discover what kind of narrative these stories construct. We aim to approach our main task with the following sub-questions: What are the main elements of the stories? How could they be used in tourism product development?

The stories are being collected by House of Lapland (HoL) in one of their marketing campaigns. HoL, an organisation based in Rovaniemi, manages Lapland's brand and promotes Lapland as a tourism destination with local partners Finavia and Visit Finland. The stories were shared through different social media channels.



According to the HoL website, they 'share the stories of locals who live the life above ordinary' (House of Lapland, 2016).

## Results

The research data consisted of 50 stories. Together, these stories can be considered to create a narrative. The narrative is co-created through the stories of the original inhabitants, those of 'returnees' and the stories of new inhabitants in Lapland. They are mostly written in Finnish and targeted to potential inhabitants of Lapland. They create and communicate a narrative of life in Lapland that is considered attractive to potential inhabitants, according to research ordered by House of Lapland (2016). In our analysis, we used qualitative content analysis and a critical close reading approach by which we interpreted meaning from the content of the data (Rantala, 2011). In general, the employment possibilities in Lapland seemed to be crucial for most of the writers. Nature and people had a significant role in most of the stories, and the same fact has also been noticed in many other researches of Lappish hospitality (e.g., Nousiainen, 2015, p. 52; Rantala & Hakkarainen, 2014).

In content analysis, coding categories were derived from the data (Tuomi & Sarajärvi, 2009). In the process, we skimmed the material and made lists of the main observations. We then categorised the different types of information found. We listed the major and minor categories or themes. The following minor categories were observed: nature, landscape, nice people, no stress, activities, work, family, good life, sports, contrast to the city life, to be different, to be brave, to be more yourself, experiences, stamina, good feeling, laughing, stories, heritage, authenticity, genuine, 'other world close', belonging, good companionship, attitude, freedom, quality time, adventure, extreme, hero stories and 'in love with Lapland'. In the analysis process, the observations were divided into four different major fields. These fields can roughly be described as activity based, experience based, social and affective.

The values and attitudes reflected in the stories are a good match with the Modern Humanist target group research made by Visit Finland (2012). The target group is openly interested in foreign cultures and in new experiences and global sustainable development (Visit Finland, 2012). Product development based on locals' stories could, thus, meet the interests of the target group.

These areas could give useful hints for the development of authentic tourism experiences: What are the places and routes favoured by the locals? What kinds of activities could be offered there? How is it possible to communicate about them? One example of a product giving good feeling and promoting good health could be a meditative, leisurely walking tour in nature, collecting wild herbs with a local guide. For those looking for extreme experiences, 'ultra-running' or mountain biking on the fells of Lapland would create a real hero story.

## Discussion

On the one hand, local inhabitants' stories emphasise multidimensional individual opportunities, and, on the other hand, they highlight different local communities and a sense of communality. Bardhi, Eckhardt and Arnould (2012) determine consumption values behind the sharing economy as temporal, place-based experiences and intangible products with use value. The sharing economy enables production of individual experiences at the same time as a sense of communality (e.g., Bock, 2015; Hakkarainen et al., 2017). The themes that come up in local narratives support these values of individuality and communality.

Social responsibility is a key issue that has to be taken into consideration when planning and developing sharing economy based tourism experiences. In some European cities, sharing economy tourism services have grown explosively without sustainable planning, causing problems in local communities. Stories written by local people suggest the aspects that locals want to share from their everyday life, as well as elements that should be protected from harm or destruction by tourism.

Reconciling the business of tourism and everyday practices is not a simple task. It is not always clear to tourism developers what is essential and relevant in local culture to be presented in tourism products, or

how to do it. To recognise the potential of local everyday life for tourism requires rethinking our daily practices, our usual ways of doing things and being. It is also essential to note that product development based on everyday life has to be done on locals' terms. In this set of research notes, we aim to recognise the potential of everyday life for tourism, from the local perspective. We also argue that the sharing economy can act as an intermediary when tourism developers desire to provide authenticity in tourism and to bring local flavour to tourism products.

We are aware of certain limitations of this research. The stories were written by the local people living in Lapland, but they were edited by the House of Lapland organisation. It is possible that some aspects were changed in order to communicate the stories in a certain way. In addition, the authors were invited to write, so they were selected. In further research, more authentic stories could be analysed, and the meanings of the stories could be analysed more deeply.

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# Festivals in Finnish Cultural Policies: Cure-All or False Hope?

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*Full Paper*

**Keywords:** festivals; cultural policy; state; steering; Finland.

## **Abstract**

Festivals currently function as crucial actors and platforms in the production, distribution and consumption of the arts and culture. They have proven to produce valuable effects on the cultural, social and economic dimensions, both directly and indirectly. In cultural policy discourse festivals are sometimes defined as a 'Swiss army knife' that is expected to serve a variety of goals concurrently. Festivals are moreover seen as an agile, flexible and cost-effective way of guaranteeing arts and culture provision today.

Our paper focuses on the relation of public cultural policy to festivals in Finland. In December 2016 the Finnish Ministry of Education and Culture released the first ever action plan for arts and culture festivals. We look into the processes leading to the policy document and assess its contents against the overall framework of cultural policies in Finland and the role of festivals in Finnish cultural life. Having served as research-based experts in the process leading to the action plan, we pose such questions as: How are festivals strategically positioned in cultural policies? How can the state steer the multitude of independent festival actors and make sure that its policy targets are realised? What are the prospects that festivals will fulfill the expectations that cultural policy assigns upon them?

The implementation of the government action plan for festivals has only just begun, hence our reading remains provisional and tentative. Still, the action plan may be interpreted as an official recognition of the increasingly important role of festivals in the cultural production cycle ('festivalisation'). The document bases the cultural policy promise of festivals both upon their artistic-cultural gains and the expected social and economic returns, combining intrinsic and instrumental value. In the future the Ministry will concentrate on selected key festivals, while the rest will be delegated to Arts Promotion Centre Finland. This may help in profiling between the different types of festivals and the policy targets set for them. It is nevertheless to be expected that the government will have difficulty in orchestrating the motley field toward its cultural policy goals. Platforms for dialogue with independent festival organisers, other funders and other stakeholders will have to be invented; and lastly, more developed tools are needed for assessing festival activities and the achievement of policy goals through funding and steering the activities otherwise.

## **Introduction**

Festivals and events are claimed to reconstruct the contemporary scenery of arts and culture (Jordan, 2016; Richards et al., 2015; Yeoman et al., 2015). They have become a popular means for people to consume and enjoy culture in an environment where holistic experiences, sense of community and expression of lifestyle are highlighted (Bennet, Taylor, & Woodward, 2014; Holbrook & Hirschman, 1982; Jakob, 2013; Pine & Gilmore, 1999). The notion 'festivalisation of culture' (Bennett et al., 2014) refers to the phenomenon of festivals turning into ever more central platforms for cultural production, distribution and consumption (Bennett et al., 2014; Négrier, 2015; Richards et al., 2015). At the same time, the conventional way of defining festivals as intermittent events taking place at a fixed location at a particular time of year is blurring. The concept has been extended and is used even by cultural institutions when packaging their programmes. All

in all, in present-day society festivals occupy, both directly and indirectly, a vital role through their manifold contributions to a variety of audiences and stakeholders (Getz, 2012; Luonila, 2016; Richards et al., 2015).

Festivals appeal to industrial and regional development actors whose aim is to use them mainly as vehicles of economic regeneration (Jordan, 2014). Festivals, with their network-based structures and live performances, are rooted in and based on the locality where they take place. Festival activities are in many ways valuable to their host regions, and festival organisations often function in partnership with the local municipality. Cultural events and festivals are used in the improvement of cities, places, neighbourhoods and regions, not solely in economic but also in socio-cultural terms (see, e.g., Luonila & Johansson, 2015). They have the ability to reflect local and individual identities and lifestyles (Bennett et al., 2014), which is conducive to place-making and branding, enhancing local welfare and bringing in not only tourists but also workforce and investors.

In cultural policy festivals are used for enhancing cultural provision in remote areas and for reaching culturally inactive people, thanks to their low threshold of participation. They moreover cater a wide variety of tastes and provide opportunities for co-production and co-creation. (See, e.g., Herranen & Karttunen, 2016; Kangas & Pirnes, 2015; Luonila, 2016.) In terms of arts financing, festivals present an alternative to funding building-based venues with year-round permanent staff (Jordan, 2014). This type of cost-effective, transient actors are tempting to the public financier today. An additional economic asset of festivals is their heavy reliance on voluntary work, which is also conducive to enhancing social cohesion and increasing local skill resources (see also Haanpää, 2017). For artists, festivals promise job opportunities, visibility, networking with domestic and international colleagues and gatekeepers as well master courses. Festivals are particular types of spectacular live performances that are communally consumed and co-created with audiences (Luonila et al., 2016; Morgan, 2008). They provide a unique platform for encounters between artists and their audiences, and they also create temporary communities among the participants. At best, these circumstances are favourable to artistic experimentation. (See, Jordan, 2016.)

Our paper focuses on the role of festivals specifically in cultural policy and draws upon the case of Finland, where festivals play a central role in cultural life. The number of arts and culture events and festivals has been growing for years and Finns have become increasingly active festival-goers. The variety of festivals is high as well, reaching from local, voluntary-based happenings to major world-class productions and covering a great number of art forms and cultural habits. (See Finland Festivals, 2017.) The Finnish case testifies to the growing interest in the potential of festivals as a multipurpose instrument for state cultural policy. The first steps towards a specific ‘festival policy’ were taken in an action plan published in 2016; as we are writing, the Finnish Ministry of Education and Culture (MinEdC) is actively preparing for its implementation. In the following we look into the processes leading to the policy document, in which we took part ourselves as researcher-experts. We aim to discuss the contents of the document against the overall cultural policies in Finland and look critically into the duties assigned to festivals and their chances of fulfilling the expectations.

Fully aware of the practical and theoretical problems of defining and identifying festivals (cf. Falassi, 1987; Newbold et al., 2015), we have chosen to trace (and analyse) the practice of Finnish cultural policies. The 2016 government action plan defines festivals as “regular events held at a certain location at a given time”. This traditional definition is no longer wholly adequate in Finland, but works for the purposes of this paper. We understand ‘festival policy’, following Ilczuk and Kulikowska (2007, p. 6), as “coherent, intentional action undertaken by any level of public authorities concerning festivals”. In the paper, we concentrate on state-level, central government policies, although other administrative levels also play an important role with regard to festivals.

## Context, Research Questions and Methodology

### The Finnish Festival Field

In European comparison, the first festivals in Finland were founded quite early, already in the latter half of the 19th century. They were public song festivals in the model of Germany and the Baltic countries, and they had a role in constructing the Finnish nation. The Savonlinna Opera festival was arranged for the first time in

1912. The 1950s brought along the Sibelius Week, the predecessor of the Helsinki Festival, and the Jyväskylä Arts Festival. In the 1960s we witnessed a festival boom, similar to many other European countries (cf. Newbold et al., 2015). The umbrella association, Finland Festivals (FF), was founded already in 1968. The dream at that time was to create an unbroken chain of high-quality events lasting all summer long, celebrating the warm days and white nights. As elsewhere, another wave began in the 1990s. By today, the membership of the FF has grown from the original eight to close on one hundred, spread all across the country. Moreover, festivals are now held year round, not solely in the summer. (Amberla, 2013; Valkonen & Valkonen, 1994; see also Rantanen, 2016.)

The tradition of volunteering is strong, as many of the Finnish festivals have been founded by local enthusiasts and artists, and a large part of the festivals are still being produced by tiny non-profit organisations. However, the biggest and/or most established festivals today employ year-round professional staff and compare themselves with arts and cultural institutions. Still, many of them rely heavily on volunteers in the realisation of the actual event. Big festivals also lobby for recognition within cultural policies and funding similar to the statutory subsidies that theatres, museums and orchestras receive from the state. This evolution results from the institutionalisation of key events and professionalisation in their management; it also reflects trends in public economy and cultural consumption.

Festivals thus currently function as crucial players and platforms in cultural production, distribution and consumption in Finland; following Jordan (2016), we might use the notion 'festivalisation of cultural production'. The number of arts and culture events and festivals is estimated to lie somewhere between 500 and 800 (Kinnunen & Haahti, 2015). In a country of 5.5 million inhabitants, there were more than 2 million visits to the FF member festivals in 2016 (Finland Festivals, 2017). The variety of festivals is high as well, ranging from pop-up grass-root events to established world-class productions, and covering a large range of art forms and cultural endeavours (see, e.g., Herranen, & Karttunen, 2016; Kainulainen, 2005; Luonila & Johansson, 2015). The FF membership, with highly demanding criteria, covers only a tip of the iceberg. Manifesting the 'festival fever' (Négrier et al., 2013), many Finnish arts and cultural institutions are also packaging their programme in the form of festivals.

### Research Materials and Procedure

The paper draws upon the authors' experiences from acting as research-based experts to the Finnish Ministry of Education and Culture (MinEdC) in festival matters. Karttunen coordinated a research project on the role of festivals in cultural policies, running between 2014 and 2016, commissioned by the Ministry from the Center for Cultural Policy Research CUPORE to provide information and insights for future government actions. Luonila functioned as a member of the supervising group for the research project. Both Luonila and Karttunen wrote their contributions to the final output of the project, a collection of articles entitled "Festivaalien Suomi" [Festivals in Finland] (Silvanto, 2016). Furthermore, Luonila served as an expert and Karttunen as a member in a working group (2015–2016) set up by the Ministry in 2015 to draft the action plan on festival policies.

The MinEdC research commission was ultimately motivated by the increasing pressures put on cultural policies to demonstrate effectiveness within the framework of the state management and steering system. The CUPORE team was expected to evaluate government policies concerning festivals and point out weaknesses in the strategic goal setting and achievement. As government festival policies have thus far consisted of direct support in the form of discretionary grants, our task was to assess the effectiveness of these funding measures. We explored the nature of the particular grant form as a policy instrument, and compiled statistics on the grant recipients and applicants in 2000–2014. We also examined details in the grant allocation practices, e.g., descriptions of grant awarding purposes in the call for applications. We moreover discussed with Ministry officials the role of festivals in cultural policies and the guidelines for grant allocation. Finally, the researchers were expected to give recommendations concerning reforms in the policy arrangements to improve delivery on policy goals.

In the paper the nature of our research is a cultural policy analysis based on the material gathered in the CUPORE project and the observations that we made in our roles as researchers and experts working in close

connection to the government. The main data for the analysis are Finnish government documents concerning festivals (working group reports, grant descriptions and application instructions, grant decisions and statistics). At CUPORE we also performed a meta-analysis of domestic and international studies on the role of festivals in cultural policies and the impacts of festivals (see Herranen & Karttunen, 2016). Statistics compiled by Finland Festivals, Statistics Finland and the Finnish Film Foundation also served as research material.

Based on all this material, we pose such questions concerning government festival policies as:

- What is the status of festivals in Finnish state-level cultural policies? How has it been changing over the years?
- How are festivals strategically positioned in the 2016 action plan? What kind of potential are they expected to have?
- Are festivals able to deliver on the major cultural policy goals and, most importantly, how could the MinEdC steer their activities towards its objectives? Do the policy expectations have any realistic base?

As researchers we moreover wish to comment on the type of evidence needed for the assessment of the effects of festivals and the impacts of policy measures on the activities of festival organisations. The main motivation behind both the setting of the CUPORE project and the MinEdC working group was, after all, to achieve and demonstrate more effectiveness within the state steering system.

### **Previous Research Related to Festival Policies and the Policy Role of Festivals**

There is ample literature concerning the impacts of festivals on various dimensions, especially the economic one, but only a few studies pertain to the role of festivals within the specific framework of cultural policies. Newbold et al. (2015, xxii) note however that the strategic role of festivals is increasingly recognised not only by local authorities but also by national governments. This does not necessarily concern the cultural policy sector, but more expressly tourism, regional development, creative industries and so on. According to previous mappings, within the bounds of 'explicit' cultural policies (see Ahearne, 2009) government-level strategies concerning festivals are rare. The study by Ilczuk & Kulikowska exemplifies this argument: when the authors carried out a survey on 20 European countries ten years ago they came to the conclusion that only in three of them one could find 'at least elements of' public festival policy: Austria, France and Portugal (Ilczuk & Kulikowska, 2007, p. 44). The recently completed research project 'Festudy' (Négrier et al., 2013) included a mapping on how much recognition different national policies accord to festivals. Although the study focused on music festivals, it depicts the overall situation of festivals in Europe as well. Clear contrasts were observed with regard to how festivals were created and how the state considers them today. There were also differences in the level of government that deals with festivals and the arguments for supporting festivals. (Négrier et al., 2013, p. 166.)

Many impact studies indicate that festivals possess a great potential within various policy domains due to their ability to contribute to cultural, social and economic dimensions in society (see, e.g., Getz, 2012; Getz, 2015; Kainulainen, 2005; Luonila & Johansson, 2015; Luonila, 2016), reflecting 'the diverse nature of events themselves' (Hall & Rusher, 2004, 222). There are festivals that create community pride, enable lower limit accessibility and generate social capital, while others foster economic regeneration and tourism. As argued in several studies, the economic impacts of festivals are linked both to the production and the consumption sides (e.g. Kainulainen, 2005), whereas the volunteering and attending is reported to enhance social and cultural capital in the host regions (e.g. Arcodia & Whitford, 2008). However, the wide variability in the definition of 'festival' as well as in the methodological approaches hampers comparisons and generalisations across the impact studies. In Finland the confusion concerns also official statistics, so that we have no definite, undisputed figure for the volume or attendance rates of festival activities. Another problem with impact studies is that they often have a strong tendency for advocacy, compiling evidence to show that festivals deliver on the desired policy dimensions. Hence they highlight positive effects and omit negative ones, and do not make comparisons across other sectors that may produce similar effects.



Cultural policy actors are keen on studies concerning the festival ‘model’, ‘form’ or ‘framework’ (Négrier et al., 2013; Jordan, 2016), the specific model of organisation and financing of festivals. This is related to their belief in festivals as a ‘Swiss army knife’ that may be adopted to serve multiple goals at the same time (Négrier et al., 2013, p. 29). In an era of austerity, there is a growing interest in the type of hybrid actors that festival organisations represent. Management studies have aptly described festivals as project-based productions whose environments are network-based structures, consisting of various stakeholder groups and co-creators (e.g. Getz, Andersson & Larson, 2007; Larson, 2002; Johansson, 2008; Luonila, 2016). As a hybrid entity that offers an agile, flexible and cost-effective way to produce arts for audiences, the ecosystem combines public and private sectors as well as market and policy logics (Jordan, 2016). In Finland, for instance, the majority of festival organisers are third-sector actors, usually associations, that receive public funding but rely to a great extent on ticket sales and private sponsorship. In this context the role of the public authority as a collaborator, enabler or facilitator is highlighted (Getz & Andersson, 2010; Luonila & Johansson, 2015).

One explanation for the lack of comprehensive cultural policy reviews on the role of festivals lies in the underdevelopment of research methodologies. Festivals come in many forms and varieties, and may thus be based on various cultural policy rationales and put to serve many different ends, both artistic-cultural and non-cultural (instrumental). To capture the multiplicity we would need correspondingly multidimensional tools of inspection, evaluation and planning. Olsen (2013) calls for the creation of new, more holistic policy frameworks to map a path for the future development of arts festivals. She herself has chosen to make use of Skot-Hansen’s (2005) ‘Four Es’ division of cultural policy objectives in her analysis of the different types of festivals and their policy functions: enlightenment, economic impact, entertainment and empowerment (Olsen, 2013).

## **The Case of Finnish Festival Policies**

### **Finnish Government Policies Relating to Festivals Since the 1960s**

In the Finnish government’s cultural budget a specific appropriation has been earmarked for the purpose of supporting cultural events since the early 1960s, when this separate cultural policy sector started to take form. Before that occasional government grants had been given to support major events. Until 1984 the grant category was titled ‘Congresses, culture days, seminars’, reflecting the awakening cultural policy trend of the period. Since the mid-1980s, the title has been ‘National arts and cultural events’. In 1999 the task of supporting the major film festivals was delegated to the Finnish Film Foundation. Today local and regional events may apply for government funding from Arts Promotion Centre Finland (formerly Arts Council of Finland). In all these cases it is a question of discretionary government grants allocated on an annual basis with money deriving from the state lottery. In 2016 the Finnish Ministry of Education and Culture allocated close on EUR 4.8 million under the rubric ‘National arts and culture festivals’.

Discussion about the need to reform the grant system began in the Finnish arts administration in the 1990s, in part due to lobbying from the festival field. Despite the requirement of ‘national’ in the rubric, the number of grant applicants and recipients has been rapidly growing. Until recently the annual appropriation has been increasing as well, testifying to the policy weight given to festivals, but not sufficiently with respect to the need. In addition, the grant awarding process at the Ministry, including consultations with the Arts Promotion Centre, has been criticised for being laborious and slow. Over the years the number of grant applicants has increased to close on 300 and the number of grant recipients to 200. The number of recipients appears high as it consists of nationally, even internationally important festivals in a country with a relatively small population, especially bearing in mind that ministry level-actors are expected to focus their attention on strategic issues.

The first report concerning the reform needs in the festival support system was prepared at the Ministry in 2000 and it led to some minor adjustments. In 2010 Arts Promotion Centre Finland (then the Arts of Council of Finland) published a research report with recommendations concerning the division of labour between the Centre and the Ministry (Rautiainen, 2010). The following year, the Ministry set up a working group to ponder on the matter. Its report was the first government document to focus on festivals and present explicit statements on their role in cultural policies. The working group consisted mainly of Ministry officials with

representation also from the Arts Council and Finland Festivals. In the report a dozen flagship festivals were set apart and compared with permanent arts and cultural institutions. Accordingly, it was demanded that they gain a similar status within cultural policies, based on a stable funding model. The idea was that the strategically most important festivals would be supported by the Ministry, while the others could be transferred to the Arts Council. (Opetus- ja kulttuuriministeriö 2011.)

The suggestions of the 2011 working group were however not acted upon because of the anticipated reform of the arts council system (Arts Promotion Centre Finland was established in 2013). The website description of the grant form and the call for applications were nevertheless revised and a special guide for applicants was introduced in 2012, on the request of the then Minister of Culture. The grant description defines accessibility of high quality events in all parts of the country as the target of state support for festivals, the appropriation being under the title 'Regional advancement of art' in the state budget, while the 9-page guide for applicants connects the grant form to all four effectiveness target areas listed in the Strategy for Cultural Policy 2020 (2009): 1) cultural base, 2) creative workers, 3) culture and citizens and 4) culture and economy.

### **The Cupore Festival Project**

The CUPORE research project (Herranen & Karttunen, 2016) established that between 2000 and 2014 altogether 274 festivals had received MinEdC support; annually the number varied between 96 (2000) and 179 (2014). During this period the appropriation grew from EUR3.8 million to EUR5.5 million (at 2014 prices).<sup>1</sup> It was also observed that there is an established core among the recipients. One fifth of the festivals had been awarded a grant annually, their share amounting to four fifths of the total sum. The Savonlinna Opera Festival had received 16 per cent of the total between 2000 and 2014. Among the other major recipients were the Tampere Theatre Festival, the Kuhmo Chamber Music Festival and the Kaustinen Folk Music Festival. In 2014, the number of applicants was 268 and the number of grant recipients was 179. The majority received grants smaller than EUR50.000; the highest awarded sum was EUR722.000 (Savonlinna) and the lowest was EUR3.000. (Herranen & Karttunen, 2016.)

The CUPORE team pointed out several weaknesses in the government policies and grant awarding practices with regard to festivals. Firstly, surprised by the wide and diverse group of grant recipients, we asked whether it would be better to have different policy targets for different types of festivals, i.e., sharper policy profiling. We also wondered about the fact that the Ministry had chosen to deal directly with such a large number of festivals a majority of which had received relatively small sums of money. Admittedly in some cases the state funding may be economically irrelevant but symbolically important, functioning as threshold money in relation to other sponsors. In terms of strategic steering, it seemed challenging to resolve how the Ministry could orient the activities of independent third sector actors toward its policy goals. The festival organisations and the other sponsors may have different emphases, and the share of government funding is often marginal in the total budget. We recommended that the Ministry should set its strategic priorities more clearly. Dialogue with the different stakeholders is necessary for the achievement of the policy goals. We also noted that in the current state of research and statistics, including the reporting required from the grant recipients, it is difficult to establish whether the funded festivals deliver on the desired goals.

### **Government Action Plan for Festivals**

While supporting arts and cultural festivals is not a new departure for the Finnish central government, the 2016 action plan is the first document to set policy targets specifically with regard to festivals. The plan covers the period 2017–2025. In European comparison, a separate plan that sets strategic targets for the long-term promotion of festivals as part of cultural policies is quite unique. The aims are to strengthen the position of festivals in cultural policy, improve the preconditions for festival activities and enhance their cultural policy

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<sup>1</sup> The figures include the film festival support which was delegated to the Finnish Film Foundation in the 1990s. The number of these grants varied annually between 5 and 7, and they were directed to the key festivals.

impacts. While there are national festival strategies in some other countries, they are usually framed within tourism and regional economic development.

The working group (WG) was composed of some dozen representatives from the arts administration, the festival field and research. The findings of the CUPORE research project were utilised extensively by the WG, and the research team served as members and experts in the WG. The working group's proposal 'Arts and cultural festivals – a cultural resource growing in strength' contains seven sets of objectives that aim to complement each other. They are related to 1) strengthening the appreciation and position of arts and cultural festivals in cultural policy, 2) financial resources, 3) increasing participation and inclusion in culture, 4) promoting sustainable development, 5) encouraging internationalisation and upskilling, 6) evidence base, and 7) developing systematic cooperation.

The WG recognised the wide array of festival types, each with varying needs and policy weights. To consolidate the operating preconditions of the major festivals, it suggested long-term funding decisions in principle. On the other hand, the WG wished to ensure renewal in the festival field by means of start-up support for new concepts, expressing concerns over the cultivation of new artistic contents and innovative activities. The WG further took notice of the nature of festivals as multilayered structures that are usually organised by independent third-sector actors and promoted by regional and local authorities and private sponsors. In the steering of the festival field towards cultural policy goals the government needs to use also other measures than monetary support, most importantly negotiation with the other stakeholders. Hence a 'round table' extending also to other relevant policy sectors was proposed as a way of enhancing the impact of festival activities.

The WG recommended a division of labour in festival matters between the Ministry and the Arts Promotion Centre, its subordinate agency. Despite lengthy discussions, the WG could not however produce a concrete suggestion for a future model. It was in any case evident that the Ministry should set its focus – on strategic cultural policy grounds – to a limited number of nationally, even internationally important festivals. In the 2011 MinEdC report it was suggested that the selection could be made on the basis of the level of current funding, so that some dozen key festivals would remain in the Ministry's mandate and the rest would be delegated to the Arts Council. The WG agreed in principle on this split and also wished to have explicit principles for the division, but was however unable draft them in detail.

In July 2017 the Ministry announced that the state will support festivals whose activities are established, regular and professional. The overall aim is to enhance the organisation of those festivals throughout the country that are explicitly important in terms of art and cultural policy. It was stated that the Ministry itself will in the future focus on festivals that have broad national importance in terms of cultural policy. The festivals need to be large in volume and annually organised and they must have year-round resources for their operations; they also have to be relevant in view of the further development of the festival scene. To make the distinction clear, the statement concludes that the selected festivals are expected to have both national and international appeal, recognition and visibility. Arts Promotion Centre Finland in turn will deal with festivals and events organised in different regions of the country, either annually or at least regularly. They need to also be conducive to the enhancement of different art forms, participation and inclusion as well as cultural diversity. The Ministry website informs that the call for applications for both the MinEdC and the Arts Promotion Center grants will be open from the end of September until the beginning of November. The new grant instructions and criteria for grant awarding will be published in September, so it is too early for us to speculate on the debates that they will arouse, let alone on their exact effects on the festival field.

### **Preliminary Findings and Interpretations**

Over the last few decades festivals have proliferated and become an established part of the artistic and cultural offering in Finland, and now their role has been recognised by the government in its first ever festivals action plan. In the document, festivals are seen as an essential feature in the cultural infrastructure, and particular measures for their further development are suggested. The biggest festivals are compared with arts and cultural institutions. Essentially a cultural policy paper, the 2016 action plan emphasises cultural and civic participation, artistic development and social and cultural capital formulation. The fact that the

reformed MinEdC Strategy for Cultural Policy 2025 (2017) links festivals mainly to cultural participation is reflected in the action plan. When discussing the cultural policy role of festivals, it is this dimension that is mentioned first. The main objective of the funding of festivals is still to ensure accessibility throughout the country.

Despite its clear artistic emphasis, the action plan presents festivals as ‘a cultural resource’ that can be put to serve numerous ends, including regional development and economic generation. In our interpretation, based on our experience from functioning in close contact with the WG, the “Swiss army knife” type description is needed to justify the status of festivals as targets of government policies and funding in the current discursive climate. It seems that cultural policy is in constant defence and looking for proofs of delivering on the overall targets set from the viewpoint of ‘state concern’.

The danger noted by the CUPORE project that the wide definition may distract strategic goal setting may be avoided by dividing the responsibility of supporting festivals between the Ministry and the Arts Promotion Centre. Even though festivals come in many types, it would be very demanding to pursue diverse cultural policy objectives within a one and same support system, as was evidenced by previous government practice. It is however too early days to draw definite conclusions on the workability of the division of labour, as the implementation phase has barely begun. It is conspicuous, though, that the Ministry’s mandate will no longer include enhancing geographic accessibility, otherwise given as the key objective of festival policies. The Arts Promotion Center is notably assigned the task of dealing with such issues as participation, inclusion, accessibility and cultural diversity.

Despite the reform, the challenge of improving and establishing effectiveness remains. One of the major problems that the government encounters when steering festivals is that they are not part of the government machinery, or even public actors. Even in the case of flagship festivals, the share of central government funding may remain below five per cent. The idea of establishing a round table, a festival forum, as presented in the action plan, is a good starting point. It would however require a particular kind of leadership not commonly found among government cultural officials, now expected to build up strategic partnerships via negotiation (see also Luonila, 2016). In the language of policy instruments (see Vedung, 1997), we need a shift from carrots to sermons, or rather dialogue, as financial resources remain limited and face the danger of being cut. The forum should include not only actors from the festival field but also representatives of the host regions and municipalities as well as sponsors. Other policy sectors such as tourism should also be involved in the co-operation. With the flagship festivals remaining in its domain, the Ministry needs to develop means of dialogic ‘target steering’, a concept that exists in policy but remains vaguely defined.

## Discussion and Conclusions

Our paper has focused on recent developments in the relation between festivals and public cultural policies in Finland. The state has given regular support to festivals for more than half a century, but last December a new phase was launched with the first ever government action plan. The aim of the document is to determine the specific role of festivals in cultural policies and the shift from loose grant policies to more strategic promotion policies. The question arises as to the reasons why state cultural policy is so interested in the potential of festivals just today. One explanation might be that festivals not only appear as a promising instrument for reaching multiple cultural policy goals but they also bridge into other, more central policy sectors. Researchers experience this as a pressure to provide ‘evidence’ usable for advocacy, selecting the positive results and neglecting the critical stances.

Another reason for the interest in festivals is the ‘festival form’, the nature of festivals as hybrid entities, and the particular project and network based, cost-effective and flexible model of organising them. Festivals represent a mixture of public policy and market logics. As Négrier (2015) points out, they exist in the middle of the changing trends in the relationship between culture and society. The benefits of the festival form include flexibility and cost-effectiveness, which effectively stand out in contrast to permanent institutions; the organisation of festivals also encourages risk-taking and entrepreneurship, values that rank high today. Hence, as Jordan (2016) notes, we come across clear neo-liberal tendencies in connection with festivals. Their flexibility has its downsides, which would need to be discussed in relation to cultural policy as well, e.g.

intermittent, precarious, even unpaid work. The form of production is vulnerable to changes in the economic climate, cultural trends and audience demands (Newbold et al., 2015). Festivals moreover do not give similar protection to the continuance of cultural provision as permanent institutions do; occasional events can hardly replace seasonal programmes (cf. also Jordan, 2016; Négrier, 2015).

The festival form may have great potential in an era of diminishing public resources, but it is also difficult to govern in the accustomed way. To achieve its targets in festival policy, which are quite considerable, the Finnish government has to build up structures for negotiation and collaborative partnerships with festival actors, host cities and sponsors (Luonila, 2016). From the festival management point of view, the public sector needs to network with the festival stakeholders and avoid conflicts with the operational level of festival management and long-term planning (Luonila & Johansson, 2015). It is only through dialogue with the different stakeholders that the government can formulate workable funding criteria for the fragmented festival field and its sustainable guidance. Therefore the 2016 action plan does not present a final truth in Finnish festival policies, but a beginning for a discursive process.

On the whole, there are a variety of issues that risk dulling the edge of the Finnish government action plan on festivals. Whether festivals turn out to be a cure-all or a false hope depends greatly on the ongoing implementation phase, consisting not only of a reform of the grant awarding principles and practices but also of designing how to govern the festival ecology. There is a need to reconceptualise the model of state toward the role of collaborator, facilitator and enabler, and to refresh cultural policy tools. If we researchers are expected to assist in the process, we need to bring ideas from arts administration and leadership studies to cultural policy research. One of the major methodological challenges facing the field today is how to capture the major shift toward network-based cultural production, which festivals exemplify par excellence.

Finally, as researchers we would like point out a fundamental problem in festival policies aiming to achieve strategic effects: the challenge of measurement. Despite flourishing research activity in this area, there is a lack of comparable and comprehensive studies. To complement ample economic impact studies, we need qualitative research on festival experiences relating to, for example, communal reception and participation (see, e.g., Kinnunen & Haahti 2015) in order to gain insight into the socio-cultural effects of festivals (see Robertson et al., 2009). Such material would provide an alternative view on the value of festivals in cultural policies, providing the required understanding of the relationship between festivals and the policy agendas in different countries and regions (see Mair & Whitford, 2013).

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# Nature-based Tourism in Cultural Environments or Cultural Tourism in Natural Environment – Developing Nature Tourism with Cultural Perspective

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*Research Note*

**Keywords:** nature-based tourism; cultural environment; exploratory study; tangible and intangible cultural heritage.

## **Abstract**

In Finland nature-based tourism takes place mainly in different forest and water areas to which the lives, histories and traditions of local people are connected. Hence, these forest and water areas in Finland are also cultural environments as humans have influenced to the formation of diverse landscapes. Nature-based tourism may profit from utilizing tangible and intangible of Finnish cultural heritage. Intangible heritage covers local habits and traditions, way of life, music, and also traditional beliefs and myths. These resources are at the moment unutilized resource in tourism products in Finland. This study is exploratory in nature as it aims to map the current state of utilizing cultural environments and cultural heritage in nature-based tourism. The data from four regional tourism development workshops is utilized to examine the service providers' and regional developers views on the topic.

## **Introduction**

Usually nature activities such as hiking, canoeing and fishing are in the focus when nature-based tourism is discussed. In Finland nature-based tourism takes place mainly in different forest and water areas to which the lives, histories and traditions of local people are connected. Hence, these forest and water areas in Finland are also cultural environments as humans have influenced to the formation of diverse landscapes. Some nature attractions have also very strong cultural connections. For instance, Finnish national landscapes are a good example of these.

It is important to note that destinations and attractions of nature and cultural tourism do not differ a lot in certain areas. Tourists may attend cultural events that take place in natural settings and natural hiking trails can be in cultural environments. It depends on services, products and images targeted to tourists with different needs and motivations, if a destination is regarded either a nature or a cultural tourism destination. Nevertheless, whichever the case is both cultural and natural elements can offer additional value for tourists. Nature tourism may profit from utilizing tangible and intangible of Finnish cultural heritage. Intangible heritage covers local habits and traditions, way of life, music, and also traditional beliefs and myths. Currently these resources seem to be rather unutilized resource in tourism products in Finland.

## **Nature-based Tourism and Cultural Resources**

Cultural environments and cultural heritage have central role as pull factors of tourism destinations. In Finnish Strategy of Cultural Environments (Ministry of the Environment, 2014) cultural environments are regarded as potential that is maintained by taking care of the environment. The cultural and environmental values of landscapes are regarded important strengths of Finnish tourism sector, which is also noted in

Finnish Tourism Strategy 2015-2025 that highlights cultural tourism and Finnish stories as central resources when tourism products are developed (Ministry of Economic Affairs, 2015).

The cultural environments of forest and water areas consist mainly from cultural landscapes and traditional biotopes. These are rather dominating elements, as 86 percent of Finnish surface are forests and 10 percent water areas. (Konu et al. 2017; Kulttuuriymparistomme.fi, 2015b.) In Finland the nature is also part of people’s everyday lives as natural environments are one way or another part of their living environments (e.g. Pasanen & Korpela, 2015). People have used nature and natural environments different ways in course of time; forest have been places where people have hunted, lived, cultivated and they have been places where ancient gods and spirits have been worshiped (Kulttuuriymparistomme.fi, 2015b).

Cultural environments of forests and lakes have strong link to Finnish human-nature relationship. Forests – and nature in wider sense – has been and still are a source for resources and a place where people can be refreshed and relaxed. (Lusto – The Finnish Forest Museum). Cultural connections and meanings of nature are evident e.g. in relics, and the importance of nature and natural elements can also be identified from the folklore – from the stories of myths and beliefs related to the ancient nature-based religion. There are also a lot intangible cultural heritage that is connected to nature, e.g. how to use natural resources e.g. as food, medicine or beauty ingredients. In last few years Finland’s National Board of Antiquities (2016) has started to map and collect intangible cultural heritage.

In addition to the forest and water areas, nature-based tourism activities take place in rural areas in wider sense. The rural landscapes have formulated and altered a lot during the last centuries and different regions have their special characteristics, e.g. diversified nature that have been influenced by the human activities and culture, well-maintained cultivation areas, traditional villages and buildings and historical sites (Kulttuuriymparistomme.fi, 2015a; Ministry of the Environment, 2011). Diverse routes have had an influence on environment and e.g. Finnish Transport Agency (2011) have pointed out ten important cultural/tourism routes, including Via Karelia and Blue Road. The theme of the roads are often connected to some specific kinds of natural or cultural resources.

Even if there are a lot or tangible and intangible resources connected to nature-based cultural heritage these resources are still unutilized in nature-based tourism products. The aim of the study is to examine how cultural heritage is utilized in nature tourism services in Finland and how diverse tourism businesses and regional developers see the potential of it as a part of nature tourism products.

## Research Design

This study is exploratory in nature as it aims to map the current state of utilizing cultural environments in nature-based tourism. The data from four regional tourism development workshops is utilized to examine the service providers’ and regional developers views on the topic. The regions represent the four Finnish destinations presented by VisitFinland – Lakeland, Lapland, Capital region (Helsinki) and Archipelago (<http://www.visitfinland.com/destinations/>). In the workshops a learning café method is used to collect the views of different stakeholders. Table 1 presents the invitation processes and the profile of participants in each workshop.

Table 1. Participants of the workshops

	Invitations	Registered	Attendees	Profile of attendees	Date
<b>Lakeland (Savonlinna)</b>	Sent through regional tourism organizations in lakeland area, to collaborator businesses of Metsähallitus	20	13	Businesses 9, Development/regional /marketing organizations 4, Research/education 0	20 March 2017
<b>Capital region (Helsinki)</b>	Sent to list of OutdoorFinland businesses (Southern Finland), to collaborator businesses of Metsähallitus	17	10	Businesses 5, Development/regional /marketing organizations 5, Research/education 0	23 March 2017

	Invitations	Registered	Attendees	Profile of attendees	Date
<b>Archipelago (Turku)</b>	Sent through regional tourism organizations in Turku region, to collaborator businesses of Metsähallitus	18	14	Businesses 5, Development/regional / marketing organizations 4, Research/education 4, Other 1	5 April 2017
<b>Lapland (Rovaniemi)</b>	Sent to list of businesses that have took part to Lapland tourism parliament, to collaborator businesses of Metsähallitus	28	12	Businesses 2, Development/regional / marketing organizations 8, Research/education 2, Other 0	26 April 2017
In addition to the participants each workshop there were three facilitators and three bookkeepers.					

During the workshops bookkeepers made notes during the workshop discussions. The data consists altogether 57 pages of written notes. The data was analysed by a qualitative content analysis that interprets meanings, themes and patterns that are visible or latent in the data examined (Çakmak & Isaac, 2012). The main themes of the analysis were themes and attributes connected to tangible and intangible culture/heritage in nature-based tourism context. To obtain more detailed and profound information, an inductive perspective was adapted to ground the examination of themes that came up under each main category.

## Findings

The preliminary findings indicate that tangible and intangible cultural heritage was identified as a potential for nature-based tourism products but currently this potential was underutilized. The recognized tangible resources were national landscapes, relics, traditional routes and hiking routes, rural areas/villages, traditional buildings, local/traditional food, sauna and sauna traditions, and diverse natural resources, such as plants and berries. Intangible cultural heritage was connected to many of these tangible resources. For instance, the traditional use of plants and knowhow how to use wild food/herbs were mentioned. The similar issue was pointed out in relation to food; what are the stories behind traditional foods and what kind of habits are connected to them.

Other identified intangible resources were ancient religion, myths, stories related to them (not just national epic Kalevala, but also beliefs in people's everyday life), local history and influence of diverse events on environment and Sami culture. In addition, resources linked to how to gain wellbeing from nature (including health benefits) and more generally Finnish culture and everyday life linked to human-nature relationship and e.g. how to get living from nature were pointed out.

According to the discussions of the workshops, currently there are only a limited number of nature-based products that have intentionally and systematically included tangible and intangible cultural heritage to the products. In all regions where the workshops took place the cultural environments were seen as a potential resource. There were few examples that brought forth tourism services that connect the cultural environment to other activities. However, most of the discussion in the workshops were connected to potential new services that could be developed by connecting nature-based tourism and cultural heritage.

The discussions in diverse workshops differed in terms of the role of cultural heritage in the discussions. The cultural heritage has smallest role in Lakeland and biggest in Archipelago area. The emphasis of the type of cultural heritage varied between the regions, e.g. in Lapland the traditional Sami culture was pointed out as one that have been utilized rather well in products. There were also discussions that local associations and local people should be better include in the development processes of the tourism product, especially related to the stories and local habits.

## Conclusions and Discussions

Based on the preliminary findings the number of tourism products utilizing cultural heritage is rather limited, but the tangible and intangible cultural heritage was regarded as rich potential by diverse tourism businesses and regional developers. When nature-based tourism is developed it is essential to tie together the nature, history and culture in the tourism products. The growing trends such as interest to travel short distances and valuing locality and authentic issues have already shown that there is demand for this type of tourism products. Diverse tourism destinations will benefit by putting more emphasis on local stories and habits, as bringing these into tourism products will bring the unique touch and bring forth the special characteristics of a destination. However, it is important that the stories and cultural heritage are interpreted suitable ways to diverse target groups. For example, there are unexploited potentials to use cultural meanings and intangible heritage in nature-based tourism products especially among Asian target groups (Konu et al., 2017). Potential ways to connect cultural heritage to nature-based tourism are e.g. organizing events in natural settings, including traditional stories and cultural meanings of nature to tourism products, developing content for thematic travel routes and organizing volunteer tourism trips to maintain cultural environments.

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# Brand Ecosystem Narratives in Cultural Heritage and Tourism Networks

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Research Note

**Keywords:** cultural heritage; value co-creation; brand ecosystem.

## Abstract

The purpose of this study is to analyze from the perspective of one stakeholder what are the risks and benefits involved in co-creating a cultural brand ecosystem. The longitudinal empirical study follows an owner-manager of a small VillaSpa located in a historic area of summer villas. Interviewing the owner / manager gave us an in-depth understanding of the phenomenon as we gathered data on how that single actor constructing a brand ecosystem viewed value co-creation. We explored the data by reference to prior literature on value co-creation and brand ecosystems. The results contribute to the research on brand ecosystems by discussing a case that is novel in researching the building of a brand ecosystem in the context of heritage and tourism. The results demonstrate the importance of involving all relevant stakeholders in co-creating a brand ecosystem. The finding should encourage future research on the joint narratives of all relevant stakeholders. The research also illustrates a perspective on failing in the course of building a brand ecosystem.

## Introduction

*“But I cannot do this alone. What is needed is cooperation.”*

This empirical study follows an owner-manager of a small spa and resort located in a historic area of summer villas, here referred to as *VillaSpa*. The entrepreneur concerned envisioned the service concept of her business as part of a joint umbrella brand that would identify with a Nordic way of life (cf. Lemmetyinen & Go, 2010). Our case entrepreneur believes in the attractiveness of the Nordic lifestyle, which is something that is increasingly of interest to tourists. The Danish concept of “*hygge*” (coziness), for example, exemplifies how cold has been made cool, and how coziness, comfort, and social connectivity can create a good quality of life based upon simple pleasures.

In a number of informal and formal conversations with the Villaspa entrepreneur, the terms *value co-creation* and *ecosystem* arose repeatedly in her conversation, which prompted the researchers to base this study on a theoretical framework of value co-creation in a brand ecosystem. The study therefore contributes to the under-studied area of brand ecosystems (Pinar et al. 2011; Pinar & Trapp, 2008), not only by introducing it in a novel context of heritage and tourism but also in connection with value co-creation (Vargo, Maglio & Akaka, 2008). The study utilizes multiple data gathering methods, and the researchers represent various theoretical discussions, such as value co-creation, brand ecosystems, network branding, and entrepreneurship (Flick, 1992, p. 194; Fine, Veis, Weseen & Wong, 2000, p. 119). The results of the study demonstrate the importance of all stakeholders co-creating the narratives of a brand ecosystem. It is important that the initiator works to involve the stakeholders in co-creating the brand ecosystem. However, doing so successfully will require the initiator to establish credibility with, and earn the trust of, the stakeholders. The case reveals that even a strong and largely preformulated concept does not guarantee success.

## Literature Review

Academic literature suggests that interaction and collaboration takes place in ecosystems (Lusch, Vargo & Tanniru, 2010), which can be broadly defined as: *“spontaneously sensing and responding spatial and temporal structures of largely loosely coupled, value-proposing and social and economic actors interacting through institutions, technology and language”* (Vargo & Lusch, 2011, p. 185). Ecosystems can be compared to living organisms in that they are continuously evolving, learning, and adapting (Vargo & Lusch, 2011). In the management literature, some scholars have used the terms networks and ecosystems interchangeably (see Frow, McColl-Kennedy, Hilton, Davidson, Payne & Brozovic, 2014), but in this study, we adopt the term *ecosystem* in analyzing the practice of co-creating a cultural brand ecosystem. The system view differs from the network view in that each occurrence of resource integration, value creation, and service provision causes changes in the nature of the ecosystem to some extent (Wieland, Polese, Vargo & Lusch, 2012.).

Prior research indicates that a brand ecosystem framework could be useful in developing successful branding strategies (Pinar & Trapp, 2008). Brand ecosystems can deliver greater customer value, because they include the value networks and interactions of value networks at every stage of the brand value building (Pinar & Trapp, 2008; Pinar et al., 2011). A brand ecosystem can be defined as *“a set of different activities that contribute to building a strong brand that covers all the stages of value creation from the initial design idea to the final consumer brand experience”* (Pinar & Trapp, 2008, p. 37). Bergvall (2006) further notes that the concept of the brand ecosystem is based on the notion that brands are as much cultural as managerial phenomena.

The concept of the brand ecosystem reflects the shift toward a more networked society (Bergvall, 2006) and involves the idea underpinning the academic literature on co-creation: it is not just firms (and their brand managers) that control brands, instead brand building involves people from different stakeholder groups (Merz, He & Vargo, 2009; Bergvall, 2006). Co-creation makes customers and other stakeholders (e.g., suppliers and distributors, community, and government) intrinsic to value creation by encouraging active involvement and dialogue to create a value rich experience (Prahalad & Ramaswamy, 2004; Perks, Gruber & Edvardsson, 2012; Chathoth, Altinayb, Harrington, Okumusd & Chane, 2013). Although the focus is on the collaboration in order to achieve value-in-use, the value is always determined individually by the beneficiary (Merz et al., 2009). All economic and social actors are essentially creating value for themselves and others through reciprocal resource integration (e.g., knowledge and skills) and service provision (Wieland, et al., 2012; Vargo & Lusch, 2004; Lusch & Vargo, 2006).

## Research Design

This empirical study analyzes the construction of a cultural ecosystem under a joint umbrella brand (Pinar & Trapp, 2008). Our case, Villaspa, is a small country spa and resort in rural Finland founded by an architect interested in the cultural heritage of a historic area of summer villas dating back to the 1850s that is among the best-preserved areas of villas in Finland. The architect bought an old villa and renovated it to make it a spa and private home. The entrepreneur envisaged offering customers an experience of country living as it used to be, but modified in a modern style. We followed our case firm for more than three years by observing and interviewing the owner-manager, who narrated how a brand ecosystem could be constructed through value co-creation.

In addition to the data collected through participant observation and in informal conversations with the entrepreneur, we conducted narrative interviews with her (Riesman, 2004). We also gathered secondary data from websites, policy documents, and information sheets to support the analysis. The study was based on the narrative interviews of the entrepreneur and the data was analyzed through the lenses of value co-creation and brand ecosystems. The analysis followed an abductive logic iterating between the data and theory (Gummesson, 2000; Ghauri & Grønhaug, 2010). The researcher triangulation was strengthened by the views on network branding and entrepreneurship (Flick, 1992, p. 194; Fine, Veis, Weseen & Wong, 2000, p. 119; Wenger et al., 2002; Zhang and Hamilton, 2010). In line with Fine et al. (2000) we allowed the subject, in our case a visionary micro-business entrepreneur, to narrate her struggles, victories, and passions that



influenced her endeavor to initiate co-creation of a brand ecosystem in the context of heritage and tourism (p. 109).

## Results and Discussion

The interviews and discussions with the Villspa entrepreneur revealed her vision for a brand ecosystem (a hub) in cultural heritage tourism consisting of a loose network of entrepreneurs and other actors from the worlds of property development, construction, and wellbeing. She believes that with the appropriate mindset, the hub could generate a story that can be re-written to match the image of the ecosystem if necessary.

*Working under the joint umbrella brand...if I were to describe the idea of it, I would say that it is a hub...a kind of ecosystem for entrepreneurs...And in terms of the entrepreneur their story can be re-written and each member of the network is a vital actor with their own personality and their own doings and interests.*

The spa entrepreneur is capable of seeing the bigger picture of the ecosystem and is enthusiastic about attaining a common goal of the coordinated brand ecosystem. Together with two trusted business consultants, she has designed value propositions that include her dream. This is illustrated as follows:

*The biggest thing was that I believed in what I was doing, and I believed in my own strength...Since then I have worked for this idea of a country spa, but always have had and still have a vision, a bigger picture in my mind.*

Not surprisingly the entrepreneur confirms that the common goal determines what resources are required to build a desirable brand image in the mind of a customer. Being a member of a larger network is seen as a benefit for a destination in that it supports creating service offerings and attracting visitors (Bergvall, 2006). The spa entrepreneur is clearly aware of this aspect:

*This is a question of learning, take, for example, the entrepreneurs who develop food products or the restaurateurs...It is a question of coming together and helping one another to raise the standard of their cuisine.*

It is evident that without support from the local institutions, the spa entrepreneur will have to find partners and private investors who share her values and vision of the area's cultural heritage if she is to brand the property as a cultural wellbeing destination.

*By developing wellness tourism and offering an all-inclusive resort for retreats, people could come from a city to the countryside...But it requires substantial investment [the renovation of nearby villas] and time...because a single family cannot cope with the financing alone.*

The local authority has shown no interest in revitalizing the villa area, and the regional destination management organization (DMO) sees no value in re-branding it as a tourist destination. It seems that in our case the coordinating actor is too small to operate alone, and therefore there is a need for the entrepreneur to construct a virtual network "of relationship(s) with suppliers, customers and other business partners" (see Go & Govers, 2010, xxix). The challenge for the entrepreneur is to find a compelling argument for the benefits of cooperation that will convince both the local institutions responsible for marketing the region as a destination and also private investors, as she explains below:

*But I cannot do this alone. What is needed is cooperation between education, research, and the regional development agency, and also the city [administration] needs to be for the idea.*

The entrepreneur has been forced to close her spa business for economic reasons. Her idea of building a brand ecosystem where the participants co-create value is still alive and she is planning a start-up with a team with broad expertise in the area of preserving and promoting cultural heritage.

In the process of constructing a brand ecosystem, we recognized the following *in between the initial design idea to the optional final consumer brand experience* (cf. Pinar & Trapp, 2008). First, it seems that most of the stakeholders have not yet become enthused about building the brand ecosystem. It is quite evident that

taking the role of the initiator or conveyor also requires good communication and presentation skills. Second, a lack of interest on the part of stakeholders is surely one of the reasons why it has been difficult to get external funding for the co-creation activities of the brand ecosystem. Third, the initiator developed a strong vision of the brand ecosystem, a vision that was largely formed before other stakeholders were involved; that left little scope for the stakeholders to participate in the creation of the joint brand. Fourth, the involvement in the value co-creation of the brand ecosystem has perhaps been too risky and too complicated to be easily adapted to suit micro enterprises in the field of tourism and culture. Finally, the entrepreneur failed in her own core business, as networking and the construction of the ecosystem clearly became her passion. The anticipated risks thus overcame the potential benefits in co-creating a cultural brand ecosystem.

## Conclusion

This study contributes to the under-studied area of academic literature on brand ecosystems (Pinar et al. 2011; Pinar & Trapp, 2008), by illustrating a case of co-creating a brand ecosystem in cultural tourism. The results of the study demonstrate that the initiating actor was too small to operate alone and to act as a hub for the other stakeholders. Moreover, the entrepreneur running her firm alone did not manage to construct a virtual network “of relationship(s) with suppliers, customers, and other business partners” (see Go & Govers, 2010, xxix). Recently the entrepreneur was forced to close her country spa and resort. She still believes in her dream of a *joint umbrella brand and brand ecosystem around it* and is looking for partners. The challenge for the entrepreneur still remains to find a compelling argument for the benefits of cooperation that will convince both the local institutions responsible for marketing the region as a destination and also private investors.

This study has introduced a case of brand ecosystem co-creation that has not yet been successful. Studying failure means we can diagnose the elements that facilitate or inhibit a phenomenon (Flyvbjerg, 2006). We will continue our longitudinal research and will next analyze the existing data in order to unravel the reasons behind the failure, and also highlight the theoretical and managerial implications from our longitudinal case study. The entrepreneur has not given up on her dream of a brand ecosystem where the participants co-create value, and is currently establishing a start-up team. We will therefore be able to continue to follow the process of brand ecosystem co-creation.

The study emphasizes the important role of value co-creation in a brand ecosystem, and should encourage research on the role of *all* relevant stakeholders, a group extending beyond the representatives of companies and their customers. In cultural tourism, choosing joint objectives, understanding others’ objectives, and implementing equal participation are clearly important for co-creating a brand ecosystem.

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# Psychophysiological Methods for Measuring Tourism Experiences by the Sea: Case Bothnian Sea

Anu Lähteenmäki-Uutela

Research Note

**Keywords:** psychophysiology; tourism experience; measurement; stress; water.

## Psychophysiological Methods in Tourism Research

Health geography and health spatial planning (e.g. Learnmoth et al., 2015; Chang et al., 2010) study how places, often people's living environments, can be modified for enhancing health directly and indirectly. Similarly, many tourism services focus on choosing and creating a destination where people can recover from stress. This is the case with *blue care*, where experiences by the water are used to increase mental well-being. Urry (1990) brought out the visual nature of tourism experience. Räikkönen (2014) calls for tourism products that focus on moving the minds of the tourists rather than moving their bodies. Humans tend to prefer a scene with water, which shows in the amount of water pictures used at tourism websites. For our brains, seeing water is a survival cue (signaling the presence of both drink and food). The aim of our research is to understand what circumstances and situations specifically help people relax by the water, and what on the other hand increases stress.

Physiology is biology that studies the physical and chemical processes in living organisms, and psychophysiology is psychology that studies the physiological foundations of psychological processes such as emotions, and measures these in living organisms (Andreassi, 2000, p. 1). Psychophysiology thus connects the study of the mind and the body. In marketing research, psychophysiological methods have been used since the 1960s. They are used for example for the purpose of understanding how customers feel about products and advertisements. In their 2008 review, Wang and Minor identified ten different methods and listed 67 marketing studies using such methods. A part of methods studies the central nervous system (brain scans), a part the autonomic nervous system (pupils, skin conductance, heartbeat, blood pressure), and a part the somatic nervous system (face muscles, eye movements). (Wang & Minor, 2008).

Emotions are crucial in tourism experience. Goossens (2000) sees tourists as pushed by their emotional needs and pulled by the emotional benefits. In their 2015 review, Li, Scott and Walters (2015) found that tourism experiences are often measured through self-reporting, and concluded that psychophysiological methods are also needed. Kim and Fesenmaier (2015) measured tourist emotions through measuring the conductance of their skin, and combined this with interviews. Skin conductance tells whether the person is stressed or not, but does not tell if the stress is positive or negative: it does not measure the valence of the emotion (Kim – Fesenmaier, 2015, p. 422). Neurotourism (Ma et al., 2014) combines brain research with tourism research. The brain-measuring approach fits to studies where the target is planning or remembering travel, but is not during travel.

Due to technology development, the chemical processes in the human body have become increasingly measurable. Hormone level measurement brings new perspectives to emotion research in tourism. It offers the possibility to gain impartial real-time data on how a person reacts to an experience. The brain guides the hormones, and hormones guide several sub-processes in the body (Lähteenmäki-Uutela, Räikkönen, & Piha, 2016). Instead of measuring heartbeat, skin conductance, or metabolic activity, one can measure the chemical that causes changes in these subsystems. Measuring for example *testosterone* (the male sexual hormone), *luteinizing hormone* (related to female ovulation, Bullivant et al., 2014), or *cortisol* (the stress hormone) can help understand tourist experiences and behaviour (Lähteenmäki-Uutela, Räikkönen & Piha, 2016). In marketing, Saad and Stenstrom (2012) have studied the impact of the menstrual cycle on

consumption. Similar approaches could be applied to female tourists. The brain transmitters *dopamine* and *serotonin* are interesting for tourism research. Dopamine, along with *adrenaline*, is related to exciting activities, and serotonin means relaxation. In mystical and sacred experiences, serotonin interestingly combines with *oxytocin* (the love hormone) and *melatonin* (the sleep hormone). Humans differ in their brain chemistry: a part of people prefer to run on serotonin (peace and quiet), whereas others are easily bored and crave for dopamine (Lähteenmäki-Uutela, 2015). Alcohol use will impact hormone levels and the tourism experience.

Cortisol is an interesting hormone related to coastal and marine tourism and blue care. Measuring the impact of green environments on cortisol levels has been studied by Bratman et al (2015). Real-time cortisol levels can be measured from saliva, blood or urine, of which saliva sampling is viable for tourists. Wolfram et al. (2013) used saliva samples to measure the stress of university students in connection to teaching the class. Eating, the time of day, and the sampling itself impact the cortisol levels (Wosu et al., 2014). For chronic stress, cortisol level in hair can be used as a biomarker (Russell et al., 2012; Stalder – Kirschbaum, 2012). Wosu et al. (2013) found 39 articles that measured cortisol from human hair, none on which in the field of tourism. Tourism researchers have taken hair samples from animals in order to study the stress caused by humans to orangutans and chimpanzees (Carlitz et al., 2014; Carlitz et al., 2016). Similarly, it could be studied how tourists cause stress for the local human population.

### Our Research

As far as we know, there are no studies measuring the impacts of water-based tourism from the tourists' bodies. Funded by the Finnish Blue Bioeconomy program by the Ministry of Agriculture and Forestry, we will measure the stress levels of tourists by the Bothnian Sea with the smart ring from the company Moodmetric in 2018. *The hypothesis is that a human relaxes by the water.* The ring measures electrodermal activity, and every jump on the curve represents a reaction of the sympathetic nervous system. The physiological lag is 1.5 seconds: for example being frightened will show with a little lag. Based on its measurements, the ring gives its user a figure between 1 and 100. A figure under 30 means a relaxed and peaceful mind, whereas over 80 is a hint of high stress or enthusiasm. The ring can record data for a maximum of 270 hours. *We will study the impact of different water-based group activities in the winter (fishing through ice), spring (bird-watching, fishing), and summer (canoeing, laying on the beach) and compare these to a trip to the forest.* The hypothesis is that fishing suits our hunter-gatherer brains well, particularly the male brain. Our participant groups are stressed Finnish students (ages 20 to 25) and stressed Finnish adults (ages 30 to 45).

We will start the measurements a day before the trip and continue until the day after the trip in order to include a normal day for control and for measuring sleep quality also. With the electrodermal measurements, we will combine demographic data on the tourist (gender, age) and weather data. We will also conduct a short survey about the perceived stress level in normal life and about how the participant feels after the trip.

In addition to studies by the Bothnian Sea, we will add one exploratory study to be conducted in Mexico for comparison. We will study how fishing by the Gulf of Mexico impacts stressed Mexican adults compared to how fishing in the Baltic Sea impacts stressed Finnish adults.

The research will be useful for managing experiences by the water. The results will show who can relax by doing what. In addition to tourism, findings on stressful situations may be applicable to the hospitality and retail sectors. From the public health perspective, chronic stress may be reduced through health spatial planning that is based on scientific evidence on the stress-relieving potential of waters. Chronic stress is one cause of modern depression (Rantala et al., 2017).

We are searching for international partners and are willing to apply for international funding in order to extend the psychophysiological tourism research agenda to other seas, lakes and rivers.

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# Cultural Heritage and Storytelling in Tourism Experience Design Studies. Case Elves Hideaway, Lapland

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*Research Note*

**Keywords:** cultural heritage; storytelling; tourism and hospitality; pedagogics; cooperation; Lapland.

## **Abstract**

Cultural heritage and storytelling are becoming more and more important elements in tourism. According to the latest statistics, tourism is a fast growing industry in Finnish Lapland. In addition, expectations and values of tourists have changed and they are nowadays looking for more authentic experiences. The experience dominant logic has been transforming the tourism industry and the tourism companies need to develop new ways to create deeper and more meaningful experiences for tourists. Stories are one of the key elements in the creation of memorable experiences. Story-based service design provides a common base that ties everything in business together and increases the value of the service experience for customers. Along with the use of storification and storytelling in the tourism and hospitality industry, valuable cultural heritage can be conveyed and local history will become better known among tourists but also among local inhabitants.

The Experience Design study units in the curriculum of the Degree Programme in Tourism at Lapland University of Applied Sciences concentrate on the process and role of storytelling in a holistic and continuing tourism experience creation process. One of the objectives of these programme-specific studies is to have deep working life cooperation with many tourism destinations and companies in Lapland and therefore these study units in question are integrated into real working life cases. From the pedagogical perspective, problem and project-based learning methods are commonly used and it is therefore obvious that phenomena from the real working life are discussed and studied in practice. This gives relevant, concrete content to studies and professional competence which students will be able to use when entering the working life after graduation.

During the past academic year, the Degree Programme in Tourism has cooperated with the destination Elves Hideaway, situated in Kõngäs village in Levi, Finnish Lapland. The core idea of the destination is based on stories, fantasy, culture and mythology of Lapland. Various methods of tourism service design have been used in the storification process. For example, the students have created customer personas of different target groups (Chinese, British and Finnish). As a result, the students have produced stories and tourism products based on the local cultural heritage and mythological beliefs.

## **Introduction**

Cultural heritage and storytelling are becoming more and more important elements in tourism. According to the latest statistics, tourism is a fast-growing industry in Finnish Lapland. In addition, expectations and values of tourists have changed and they are nowadays looking for more authentic experiences (MacCannell, 1999). The experience dominant logic has been transforming the tourism industry and in consequence, tourism companies need to develop new ways to create deeper and more meaningful experiences for their customers. Stories are one of the key elements in the creation of memorable experiences. The story-based service design provides a common base that ties everything in business together and increases the value of the service experience for customers. Along with the use of storytelling in the tourism and hospitality industry, valuable cultural heritage can be conveyed and local history will become better known among tourists but also among local inhabitants. This paper discusses a case study in which different service design

methods have been used in the tourism education when creating new stories and products for a tourism company. The main focus is on cultural heritage and how it is used in tourism service design. Therefore, the research question is "Which asset can cultural heritage bring to tourism service design / destination from the educational and pedagogical viewpoint?"

The *Experience Design* study units in the curriculum of the Degree Programme in Tourism (DPT) at Lapland University of Applied Sciences concentrate on experience design in which the role of storytelling is seen in a holistic and continuing tourism experience creation. One of the objectives of these programme-specific studies is to have deep working life cooperation with many tourism destinations and companies in Lapland and therefore these study units in question are integrated into real working life cases. From the pedagogical perspective, problem and project-based learning methods are commonly used and that is why it is obvious that phenomena from the real working life are discussed and studied in practice. This gives relevant, concrete content to studies and professional competence for students to be utilised when entering the working life after their graduation (Lapland UAS, 2017).

During the past academic year, the Degree Programme in Tourism has cooperated with the tourism destination *Elves Hideaway* (its Finnish translation is Tonttula). *Elves Hideaway* is an experience village and it is situated in Kōngäs, a small village in Levi, Finnish Lapland. The main courtyard of the village has a view of River Ounasjoki with multiple old and new wooden buildings scattered around the area. The area expands to the *Magical forest* area which hides away the three new huts of *the Elf School*, *Wise Elf's House* and *the Gingerbread House* and the winter activity area. In the activity area, it is possible to play football or use slides and sledges. Visitors can also see and pet horses, sheep and reindeer. In addition, there is an accommodation possibility in the beautiful boutique hotel Taivaanvalkeat or in a romantic country house. In the same area, there is a sauna, forest and a gardening field. Additionally, farther away from the main area there is *the Northern Lights Kota*, an excellent spot for Northern Lights hunting in a cosy atmosphere (Tonttula, 2017). The Experience Village offers story-based tours for its visitors. The main values of services are respecting nature, Lappish traditions and history as well as remaining authentic. The place is ideal for experiencing real life things in the fairytale settings.

The core idea of the destination is based on stories, fantasy, local culture and mythology of Lapland. The main buildings have existed since 1992 when Päivikki Palosaari, the founder and owner of Hullu Poro Oy, bought the land and its buildings from Stora Enso (Levi Center Hullu Poro, 2017). Päivikki Palosaari is the actual creative mind behind *Elves Hideaway* as the core story of *The Elf in a Yellow Dress* is based on the history of her own family. Therefore, different characters in the story represent her own family members, for example Ämmi whose character originates from Palosaari's own mother. Additionally, all the different buildings located at *Elves Hideaway* appear in the story as they were part of Palosaari's own childhood. The story of *Elves Hideaway* has been co-created by the team of Hullu Poro Ltd (Törmi, 2017). The location is therefore ideal for students to study in practice how the cultural heritage of the area with all its various elements has been taken into use by a local tourism company.

## Literature Review

One of the main objectives of the Experience Design study units is to teach tourism students how authentic experiences are created and used in practice in the tourism field. The teachers of the degree programme plan these study units together with local tourism companies in the area. It has been important to develop a pedagogical model, which would benefit all parties; the students, the real-life company and the goals of the curriculum. During the co-creation process, the aspects of cultural heritage, authenticity, storytelling and storification have been utilised and implemented in the pedagogical model. The main theoretical concepts are discussed in more detail in the following paragraphs.

According to McCain and Ray, Ivanko (1996) states that within the study of tourism, there is substantial interest in the characteristics that distinguish between groups of travellers that have differing motivations that drive their choice of destinations and activities for tourism decisions. Additionally, the growth in the tourism industry is primarily derived in special interest segments that include diverse interests such as rural

tourism, heritage/cultural, naturebased tourism and adventure-experience-based tourism (Ivanko, 1996). Therefore, it is important for tourism companies to create products in which cultural heritage is valued.

Experiences are becoming more and more popular in the tourism industry as consumers are now more interested in differentiated products, where it is no longer enough for destinations to compete with their facilities and amenities, but instead they need to create differentiating experiences. It becomes difficult for travellers to distinguish the benefits of one destination from another, since most of them have more or less the same offer. *Elves Hideaway* has a high competitive advantage, as there are very few similar products in the area and the destination is set in an exclusive location, with an authentic narrative (Lagiewksi & Zekan, 2006). Tourists also seek to find experiences specific to the destination (Gisolf, 2010).

Experiences can be enhanced by stories. Stories make messages and activities more understandable, memorable, inspiring and entertaining. In brief, stories can be used as a strategic tool, which gives value to the experience and facilitates marketing the services. Stories are an effective way of conveying core values and personality of a brand for customers as well as for the staff. (Kalliomäki, 2016.) According to Sylvester (2006) “stories take advantage of our universal, instinctive and immediate connection to personal drama. They are the perfect package for learning. They grab and hold attention. They stick bright, powerfully magnetic images onto the fridge doors of our memory, allowing us to hold together stacks of complex and subtle information” (p. 1).

Story-based service design can help in creating services and products for customers. First, their needs and expectations have to be understood. Fictional customer personas can be created for the company to best meet its customers’ needs. These customer personas help to define for whom the service and experience are created and what the expectations of those customers are. Basically, customer personas are used in order to find out the ideal customers for the company which then become the main target market (Mulder & Yaar, 2007). Customer personas are fictional representatives of the ideal customers to whom the company is targeting their products. Personas help the companies in marketing, sales and product and service development. They give deeper understanding of the target group and therefore make the development work more efficient (Grudin & Pruitt, 2003, pp. 1-4). In order to create real customer personas, you have to have deep understanding of the personas. Demographic, psychographic, behavioral and environmental areas are crucial to include to the personas' building process (MacDougall, 2017).

Storification as a tool provides a common thread that ties pre-, onsite and post-experiences together (Kalliomäki, 2017). Besides, as the customer experience continuously follows the storyline, a unique selling point (USP) is created. Similarly, using a story can certainly help with creating the staged authenticity as it helps create a somewhat believable image that the entire experience is then based on.

Authenticity is an important factor in tourism as the tourists want to have authentic experiences and have an access to backstage (MacCannell, 1995). It can be argued that customers participating in the tourism experience can perceive authenticity on various levels. In general, there are numerous ways in which authenticity can be experienced. However, it should be noted that the experience of authenticity is in its core subjective and thus, a projection of an individual’s own beliefs onto a service encounter (Wang, 1999, pp. 349–370). Nevertheless, according to Wang (1999, p. 351), MacCannell (1973) introduces the concept of a so-called staged authenticity. In other words, services or commodities appear authentic because of the way they are constructed (MacCannell, 1973; Wang, 1999, p. 351). To be specific, a service may appear as authentic through the use of imagery and beliefs. In case of the experiential customer journey, the constructed authenticity certainly comes into play. In other words, through the continuous use of a past story within the pre-, onsite and post-phase, staged authenticity can somewhat be experienced. The level of customer engagement has also a direct influence on the authenticity. Thus, if a customer plays just a passive role within a service or product it reduces one’s perception of the authenticity whereas active involvement and engagement during the process, strengthen the authentically features of the product (Lu, Chi, & Liu, 2015).

In *Elves Hideaway* the visitors get the opportunity to immerse into a fictional and artificial environment through the use of storytelling (Dicks, 2003, pp. 94–99). Despite *Elves Hideaway*’s artificial character, authenticity can still be experienced through the visual as well as emotional aspects. Overall, if the experience

feels genuine and continuously follows the story, it certainly qualifies as an authentic service encounter. Therefore, during the journey visitors will solely encounter elements and characters of the core story.

Based on Ram, Björk and Weidenfeld (2016, pp. 110, 116), the experience of authenticity often correlates to a place. In other words, it is pointed out by the authors that attractions located in places with a high heritage value are perceived as more authentic. Thus, authenticity is partly depending upon the location. When it comes to the herein described service experience, the location in general holds a low heritage value. For the purpose of increasing the perception of authenticity, marketing and planning activities have to create stronger connections between the offered service and Palosaari's family story (Ram et al., 2016, pp. 110,116).

## Research Design

This paper presents an example of a case implemented by the students of DPT in which different service design methods have been used in creating new stories and products for a tourism company. The research question can be formulated as "Which asset can cultural heritage bring to tourism service design / destination from the educational and pedagogical viewpoint?"

The project results of the students as well as the feedback received from them and the commissioner have been used as the research data. Additionally, the participative observation has been used as a research method. The authors have had a strong role in the process, as initiators and as teachers.

The students involved in the study unit Experience Design used storytelling and other experience design tools throughout the development process of creating a new experience product for Elves Hideaway. The student teams had different target groups and different seasons for which the experience product was designed. They were defined by Elves Hideaway and were according to real needs of the company. The objective was to create new tourism products according to the following target group specification: Chinese customers in the autumn, British customers in December and Finnish families in the summer. Naturally, when developing a new product, the existing values and settings of Elves Hideaway were first studied, respected and included in the plans. The students visited Elves Hideaway at the beginning of the commission to take pictures and videos of the area beforehand which they utilised when completing different assignments of the course. They also visited the three different hidden huts in the Magical Forest to gain some inspiration on how to take the space and the nearby area into consideration in their products. Additionally, they discussed the expectations with the representatives of the commissioner regarding the products, such as realistic price levels. In the international and multicultural group of DPT there are students from different nationalities and backgrounds. This brings added value in the product development process targeted for international customer groups. This time the student group consisted of Finnish, Russian, Hungarian and Japanese students.

## Results and Discussion

### Research Process

During the co-creation process the values of the destination and the aspects of authenticity, storytelling and storification were utilised and implemented to the possible extent. First the students learnt the basic concepts in theory. Then they examined carefully the story of the Elf in a Yellow Dress which has originally been written by a real author. Then had brainstorming and writing workshops in which every group created a core story of the group, which acted as a backbone of the product. The writing process was challenging but very productive in the end. The students were able to create innovative core stories for their products.

The students also worked on the values related to the products of Elves Hideaway. One of their tasks was to find the core feeling and identity for a new product and to map the core values. The so-called story tree tool was also employed in order to design a fairytale suitable for the purposes of the company of Elves Hideaway. This tool, for instance, depicts certain aspects, which need to be incorporated throughout the storification process such as story elements, real diamonds and finally the tree trunk that represents the customers (Kalliomäki, 2017). The students developed various visual and very specific customer personas in order to design a good user experience product, which would meet customer needs. Consequently, based on these

customer personas they created a customer journey, and also the dramatic arc was planned and visually drawn of the created customer journey. The dramatic arc consists of all important stages during the pre-, on-site and post-experience of a customer. It is vital to create memorable experiences during the whole service process to provide a meaningful experience to a customer. As such, it is also significant to consider all stages during the pre-experience and post experience (Gelter, 2010, p. 195). Therefore, during the co-creation process the identification of touchpoints throughout the whole customer journey was made. In addition, the students calculated suitable product prices and gave suggestions for developing the product further in terms of other seasons and target groups. They also created product cards which summarized all these features. For the purpose of creating meaningful experiences, the aspect of multisensory perception was taken into account as well in the process. The more senses are activated throughout the service encounter, the more likely customers are to gain meaningful experiences (Pine & Gilmore, 1999, p. 59–61).

### Results and Experience Products

One result of the process was *Charming Tour at Elves Hideaway*, a 5-hour guided story-driven tour next to the nature directed to Chinese couples that could utilise the already existing settings in Elves Hideaway. According to Visit Lapland, the Chinese target group can be afraid of dark, worry about feeling cold or getting lost. Therefore, their needs are defined as safety, day light, warmth and knowing how to find their way (Visit Finland, 2017). Chinese customers are looking for fairytales, friendly customer service in their own language, local knowledge and good Lappish food. Meaningful touch points of their visit are nature and outdoor activities as well as shopping. In addition, they have a high interest in decorations and handicrafts, culture, spicy food and small surprises during their visit (Visit Finland, 2017). Consequently, the Charming Tour includes Finnish and Lappish cultural elements and values. Possible language issues have also been taken into consideration by including a Chinese guide in the experience product for taking pictures and being part of the story.

The second group designed an experience product for Finnish families in the summer season, *The Journey of the Wise Elf*. The product adds an adventure element to the existing services of Elves Hideaway, still utilising the original core story when making a new story that features characters from the original one to create a more holistic experience. This service aims at fostering respect towards wildlife, natural environment and each other. Besides, the purpose of this tourism experience is to provide customers with the opportunity to spend some quality time with their family whilst getting to know Finnish Lapland.

The third group designed *The Exclusive Family Adventure with the Elf in a Yellow Dress*. This story is a continuum of The Elf in a Yellow Dress story. The main elements, characters and objects of the original story are retained and the story is being constructed around these factors. This adventure teaches how important it is to spread happiness, take care of the nature and of course be brave and helpful. The story has an open ending so that it gives the readers an opportunity to be part of the story and create the ending by themselves. The product will give a chance to the customers to forget the real world and experience something completely different in Elves Hideaway.

### Conclusion

As mentioned earlier, this paper presents a model in which different service design methods have been used in teaching for creating new stories and products for a real tourism company. Cultural heritage, values and authenticity are core concepts in developing tourism destinations.

In the Experience Design study unit, the main objective was to create new experiential customer journeys with the aim of creating meaningful all-year-round services based on the already existing story of Elves Hideaway. In addition, one of the tasks was to connect the Wise Elf's House to the other services of Elves Hideaway. For the successful execution of the commission, the students learnt different methods and tools related to service design and storytelling to create preliminary scripts for staged experiences. The main idea was to first design core stories for the products and then to plan a tourism product and customer journey to a certain target group.

The created service concepts relate to Elves Hideaway's core story and thus the story of Palosaari's family, which makes them authentic. In addition, the tourism experiences are based on Finnish Lapland and utilise local products and traditions. Therefore, by participating in the journeys, authentic Lappish elements can be experienced.

The results of the co-creation process were innovative and the commissioner was content with the end stories and products. The commissioner got many different ideas and knowledge of different target groups. The student groups also learnt a lot in the co-creation process; from the teachers, the commissioner, the materials and from each other. As a result, the students produced stories and tourism products based on local cultural heritage and mythological beliefs. We can consider the used model of service design in teaching successful. In further research, the model could be tested in a different destination.

Elves Hideaway has been a good destination to cooperate with from the pedagogical and curricular perspective. There are also other tourism companies and destinations involved in the cooperation between the Degree Programme in Tourism and the tourism and hospitality field in the area. However, new cooperation partners are being searched all the time. This kind of cooperation has been regarded very valuable because students can get field-related experience and make contacts with local entrepreneurs and organisations. Naturally it requires commitment and systematic work from all parties involved.

In the same way as other industries, the tourism and hospitality industry has developed new forms of operations to be able to meet the needs and expectations of its customers. Authenticity, values and cultural heritage are regarded important and valuable. People seek experiences and want to know more about local and cultural issues. Therefore, cultural heritage is one of the focal areas to be taken into consideration when creating new tourism products and offering experiential tourism products as something unique and valuable.

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# Sustainability, Heritage and Tourism in The Three Historic Towns

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*Research Note*

**Keywords:** sustainability; world heritage; community; co-creation.

## Introduction

The goal of the project LiviHeri, Living with Cultural Heritage, is to learn how to live, develop and cherish a historic town while preserving its characteristic environment and liveability.

The partner towns – Rauma in Finland, Visby in Sweden and Kuldiga in Latvia – are historically connected by the Baltic Sea trade routes, have been permanently inhabited since the Medieval Period and are lively, bustling towns today. All of them are also either World Heritage Sites or included in a Tentative List (UNESCO World Heritage List, 1991, 1995; Tentative Lists, 2011). A joint feature for all the partners, in addition to World Heritage, is that the built heritage which is the key value in these towns, is mostly private. This fact multiplies the amount of key stakeholders; it is not sufficient to cooperate inside the public sector. The private sector, which consists of local house owners, entrepreneurs, NGO's and other actors, needs to be involved in every step.

The hypothesis, on which the project is built on, is that the project goal can be reached in a public-private partnership and with community-based activities.

The starting point for all actions and activities is natural and cultural heritage and sustainable tourism. The project also builds up the capacity for conserving the outstanding universal values recognized as World Heritage values in Old Rauma, Visby and Kuldiga with the support of all partners.

Firstly, in the LiviHeri model sustainable tourism is seen as a mechanism that can connect cultural heritage and people. Secondly, sustainability is understood as a holistic approach to society, environment and development as Julian Agyeman et al. defines it:

*“Sustainability cannot be simply a ‘green’, or ‘environmental’ concern, important though ‘environmental’ aspects of sustainability are. A truly sustainable society is one where wider questions of social needs and welfare, and economic opportunity are integrally related to environmental limits imposed by supporting ecosystems” (Agyeman et al., 2002, p. 78).*

With this approach, sustainable tourism connects cultural heritage and people, as well local people as visitors, in a way which enhances equal and just (Agyeman, 2002, 2003, 2013; Agyeman, Bullard & Evan, 2016) possibilities to access these historic towns. Heritage tourism and the prosperity gained of it is desired, but the scale needs to be fitted in a way that allows the local community to still inhabit the town centre permanently. In other words, many tourist attractions should be activities and elements provided by the mundane town life, for and/or by the local community.

Thirdly, in LiviHeri model historic town is understood as a developing, combined work of nature and of man – as a historic urban landscape<sup>1</sup> – which needs to be experienced within the cultural framework of those who have created and sustained them (Rodwell, 2010; Operational Guidelines for the Implementation of the World Heritage Convention, 2008; see also Dumitrescu, 2015). The objective of the activities is also to build

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<sup>1</sup> Vienna Memorandum on “World Heritage and Contemporary Architecture – Managing the Historic Urban Landscape”. UNESCO 2005. <http://whc.unesco.org/archive/2005/whc05-15ga-inf7e.pdf> Accessed 21.8.2017

public-private partnership (Lemos & Agrawal, 2006; Alexander, Andrachuk & Armitage, 2016) and resilience<sup>2</sup> for historic urban landscape against disturbance or shocks, which changes in the surrounding society, economy or ecosystem may cause (Biggs, Schlüter, & Schoon, 2015).

Julian Agyeman (2012) has also stated, that we have knowledge about how to enhance sustainability in all of its domains; we are just not doing it. As theories for environmental education show (Palmer, 1998; Jeronen & Kaikkonen, 2001; Palonen & Koskinen, 2005), increase of environmental knowledge, awareness and sensitivity promotes the will to act for the environment, as well for the natural as for the cultural one. The community-based approach (Berkes, 2004) of the project pursues to enhance local peoples' cultural identity and sense of belonging. One method for empowering the local community is to contribute to creation of economic opportunities. In this project the objective is to search for such opportunities, which support local community's possibilities to gain economically from their environmental knowledge, holistic conservation of natural and cultural environment and of cultural identity with sustainable tourism.

The area known today as Old Rauma has always been the centre of the town of Rauma. It has retained its medieval, irregular street and plot layout in spite of many attempts at modernization. Inscribed into the World Heritage List in 1991, the site's popularity among international tourists keeps increasing. Kuldiga was a major Hanseatic town. The old wooden town of Kuldiga is still the functional centre of the town. Fishing tourists are familiar with Kuldiga, thanks to the Venta River that flows at the edge of the city and has abundant fish population. Cultural tourists are also becoming increasingly interested in the town. Located on the island of Gotland, Visby is the most obviously medieval one out of the three towns. In addition to being a popular holiday destination for Swedes, Gotland is also often visited by international cruise ships. Visby is the busiest tourist town of the three, but in Visby, some tourism-related phenomena, such as the seasonality of services and number of holiday homes, are already visible as opposed to the two quieter partner towns. Visby was inscribed into UNESCO's World Heritage List in 1995.

In addition to their long town history and World Heritage status, Rauma, Kuldiga and Visby are connected by their relatively long distance to the country's capital and other major cities. On one hand, the distance poses a challenge to the towns; to be an attractive destination they must offer something unique. On the other hand, the towns are protected by distance: only the most interested tourists visit them, and these tourists are often willing to support sustainable practices.

### **Implementation Methods**

Implementation methods are based on paradigm shift from consumable products to consumable processes. Activities are co-produced with local community and public actors around towns' public and private spaces.

Opening the doors of a private home to visitors in the form of home visits or home accommodation lets the visitors experience the everyday life of the town, for example heating a house using fireplaces or the constant need for maintenance of buildings. At an artist's studio, visitors can learn about how local cultural heritage has affected art and participate in community art projects. A medieval town is also a fixed archaeological relic and significant information about the town's past is recorded in the soil layers beneath the contemporary town. Construction works often require archaeological measures in order to document and study the archaeological heritage of the site. By opening the current archaeological excavations to visitors, either on-site or in social media, it is possible to introduce these hidden layers for a short moment before they are been covered again.

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<sup>2</sup> "Resilience is the capacity of a system, be it an individual, a forest, a city or an economy, to deal with change and continue to develop. It is about how humans and nature can use shocks and disturbances like a financial crisis or climate change to spur renewal and innovative thinking."

What is resilience? Stockholm Resilience Centre. <http://www.stockholmresilience.org/research/research-news/2015-02-19-what-is-resilience.html>

In order to produce activities around heritage conservation processes, partnerships between the private and public actors and co-creation<sup>3</sup> of experiences are required. In this type of cooperation, the key action is sharing. Public actors are more focused on increasing knowledge and distributing it through research, education, interpretation and other supporting services among stakeholders and visitors. Private actors are focused on providing the scene – their home or business facilities – to other locals and visitors. Visitors wish to consume experiences. Joint task of all actors is to co-create experiences in these shared spaces, contributing to it with the skills, knowledge, communication or other capacity they possess, including funds. Buying these experiences, like home accommodation, is not considered as purchase but as contribution to World Heritage conservation.

## First Results

The project, which began in September 2015 and will continue until November 2018, has passed its halfway. At this point, we can present some preliminary results.

In Old Rauma, home accommodation pilot projects have been very successful. Houses offering home accommodations have “house books” provided by the project. The books, which include information about the microhistory of the house based on several archive sources, have received extremely positive feedback. The guests also appreciate the personal guidance they get from their hosts and the chance to contribute to World Heritage by purchasing services from the locals. In addition to gaining some funds that can be used to restore the houses, the locals who are hosting guests feel that they gain interesting experiences. This activity has already been expanded to Kuldiga, where most of the locals are not yet used to work with visitors.

Restoration workshops in Latvia have brought together professionals from all around the Baltic Sea region. The ongoing restoration projects have sparked interest in visitors and locals alike, and the restoration sites have been popular attractions.

Archaeological heritage has been highlighted especially in social media. The Day of Archaeology event in Old Rauma in summer 2016 attracted more than 100 visitors to the excavations in a short period of time. In summer 2017 first results were introduced on an excavation site, which is now covered.

Communication has been particularly efficient in social media. This is an excellent channel for sharing tacit knowledge and crowdsourced information.

## Discussion

Cultural environments like the towns of Visby, Rauma and Kuldiga need robust community to survive through centuries. The ownership of the estates is fragmented in all the participating towns and house owners have unequal financial possibilities to maintain their property. Newcomers may lack skills in dwelling a historic building. Local craftsmen are ageing, and the loss of skills necessary for conservation of buildings is under actual threat. Climate change brings new challenges to natural and cultural environments. Public funding for protected natural areas, listed buildings and other elements of cultural environments is more likely to reduce than increase when governments are tackling the various challenges of climate change<sup>4</sup>. The most effective way to conserve natural and cultural heritage and to tackle various future challenges is to empower the local community to act for heritage.

In environmental justice paradigm jointly developed shared future is a desirable objective to which everyone can contribute in shaping, making and co-creating it (Agyeman, Schlosberg, Craven & Matthews, 2016). This interpretation of environmental justice complies sustainable tourism; everyone can contribute to conservation of cultural and/or natural heritage.

<sup>3</sup> Co-creation is the joint, collaborative, concurrent, peer-like process of producing new value, both materially and symbolically (Galvano & Dallì, 2014; p. 644)

<sup>4</sup> Nordic Council of Ministers: Nordic working papers; CERCMA Cultural Heritage as Resource

Uses of heritage in a historic town as a product for tourist attraction can lead to higher prices in real estate markets, rents and services in the area. It can erase commercial services of everyday use and alienate local stakeholders from their cultural heritage. Simultaneously it erases the most authentic part of a historic town, the human interaction with environment (Jokilehto, 2006).

Human interaction with the environment in a historic town is a trajectory through centuries, which has processed the cultural heritage we nurture, conserve and pass on to the future generations. Turning this heritage process into an attraction requires public-private partnership. Lessons learnt from adaptive comanagement of ecosystems and social-ecological systems can be useful when building these partnerships. These flexible community-based systems of resource management include various organizations and different levels of governance (Olsson, Folke, & Berkes, 2004).

Resilience is a valuable capital of a historic town. Resilience can be maintained and strengthened with just uses of environment and heritage possessed in it between local community and visitors. Sustainable tourism offers a good variety of tools for building resilience and safeguarding our shared heritage to future generations.

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# Sydney Opera House: Conservation Informed by Stories

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*Research Note*

**Keywords:** oral history; concrete conservation; conservation management plan; Sydney Opera House; world heritage.

## **Abstract**

Sydney Opera House was inscribed on the World Heritage List in 2007 as a “*masterpiece of human creative genius*”. This paper presents a brief overview of the significant role and key features of oral histories collected in the development of a Concrete Conservation Framework for Sydney Opera House, as part of the ‘Keeping It Modern’ Getty Foundation Initiative.

## **Introduction**

Sydney Opera House (SOH) is an iconic performing arts centre, recognised internationally as a modern architectural masterpiece. As Australia’s premier tourism destination, it attracts over 8 million visitors annually. The SOH is famous for its innovative use of structural concrete and was inscribed on the World Heritage List in 2007.

This paper provides a brief overview of how oral history collection, storage and presentation formed a key element in the development of a Concrete Conservation Framework (CCF) for the SOH.

## **Concrete Conservation Framework Background**

The CCF was developed by SOH with funding from the Getty Foundation “Keeping It Modern” (KIM) initiative in partnership with The University of Sydney, Arup and GML Heritage.

The SOH CCF relies on the principles specified in:

- SOH Conservation Management Plan 3<sup>rd</sup> Edition (Kerr, 2003); 4<sup>th</sup> Edition Croker (in print),
- SOH Enterprise strategy, (SOH, 2013) and
- Utzon Design Principles, (Utzon 2002),

to provide guidance on how to conserve and manage the significance of the SOH. The CCF will be incorporated into the Building Information Management Model (BIMM) which may support a reporting user-friendly graphical interface.

The complexities of the SOH design and construction necessitate a bespoke solution to manage plan drawings and other building related documentation. Over the 40 year life of the building many alterations have occurred and creating a “single source of truth” became important to enable access to and dissemination of accurate information regarding the building. For example:

*“.....we went up to Newcastle to the shipyards... to see whether they would be capable of bending the steel plates to the shapes that he (Utzon) was envisaging..... that was just one solution that disappeared”*

(Ian McKenzie transcript, April 2016).

Prior to the commencement of the KIM project, SOH had identified the need to develop a methodology to enable access to accurate information (specifically relating to structure, construction methods and maintenance) in a timely fashion to support the CCF development. The CCF document management system became known as the *Repository of Knowledge (ROK)*, and is used to manage storage of and access to, reports and correspondence, in addition to photographs, film, and other media. The ROK also has the capability to interface with the BIMM, to enable linkage of information to spatial locations.

### **Significance of Oral History within the Concrete Conservation Framework**

Throughout the development of the CCF project, oral histories were identified as key to unlocking some of the mysteries of the SOH. There were many areas where the available documentation was either inconsistent or unclear. It became evident that there were significant gaps in readily available information on either original construction methods or later inspections and maintenance activities. Initially, several issues were resolved by accessing one of the “original” engineers (involved in the original SOH construction) who was able to provide a verbal explanation.

Further, it was identified that integration of information required an understanding of the rationale behind different inspection and maintenance programs, to place these activities within the structure’s overall timeline.

This initial work prioritised the collection of oral histories and key people, from the early construction phases through to more recent building upgrades, were identified as potential sources of historical information.

### **Oral History Methodology**

While SOH has collected oral histories in the past, it did not have a documented methodology to inform the KIM project. During the initial planning for oral history collection, numerous resources were utilised to develop an effective and efficient methodology to support the CCF. These included: Adams (2010); Kansteiner (2012); Oral History Australia (OHA) South Australia/Northern Territory (2016), OHA (2004, 2007a and 2007b) and Veal & Schilling (2004).

It was determined that the following parallel work-streams were required:

- Engagement of professional oral historian;
- Identification of interviewees;
- Definition of information required to finalise the CCF;
- Confirmation of requirements to enable film production for broad dissemination of project outcomes, and
- Development of *Repository of Knowledge* access.

Firstly, a professional oral historian, with an architectural background, was engaged with a defined scope of work: preparation of question material; interview; transcription and editing (Charleton, Myers & Sharpless, 2007); (Adams, 2004) and (Thompson, 2000). After reviewing previous oral history interviews and archival material, the oral historian provided draft questions for review and extended the areas of discussion to reflect the CCF’s expanding knowledgebase (Watson, 2006); (Fromonot, 1988) and (Drew and Utzon, 2000).

Initial project team document searches, carried out to inform the CCF, had also identified a list of possible interviewees which was expanded to include further participants by the CCF Steering Committee and SOH Executive. Interviews were prioritised to address the knowledge gaps identified during the development of the CCF. All candidates contacted agreed to participate. Participants completed a legal release to enable SOH to film and use material from the interview. Interviews were scheduled and conducted with high quality digital recording technology, in quiet locations, (Adams, 2004) and (Thompson, 2000). The interviews were professionally transcribed, provided to the candidates for review, edited and then filed within the ROK as



Waveform Audio Files (.wav) and Word documents (.doc). During the interviews archival material including photographs, were used to: prompt memories of the interviewees, and provide clarifications.

Group meetings with the interviewees provided additional information, primarily relating to the undocumented details of construction methodologies. These were also digitally recorded, professionally transcribed, edited by all participants and filed in the ROK.

A professional film-maker was engaged to film footage of interviewees and to conduct further interviews to camera, where key points were clarified and sound bites captured on film (Jones, 2004). This provided valuable raw material for future projects. All project team members and interviewees were filmed, in various locations throughout SOH and at the University of Sydney (Figs. 1-6). In collaboration with the film-makers the project team developed the script for the two professionally narrated films: ([film link](#)).

In addition, personal memorabilia libraries were reviewed and copied to add to the ROK (McMahon & Rogers, 2013). The ROK includes indexes, time tags and description of each transcript and associated archival information to enable access in accordance with SOH policies.

## Results and Discussion

The oral histories component of this project identified a number of people who were involved in the construction and early years of the SOH (including current employees) and invited them to share their knowledge. Pieces of previously unknown historical information, including undocumented details related to construction methodology were identified during the process. All who participated in the project candidly shared their stories and memories, and in many cases provided access to their personal memorabilia collections.

Sixteen oral history interviews were conducted over ten weeks: seven from the early construction phases and three from the early years of operation. A further six interviews were conducted with people who were currently working at SOH.

The interviews provided valuable information on the details of methodology adopted during construction and provided a deeper understanding of the engineering difficulties encountered during both design and execution phases, which were resolved in the early days of using computers in construction:

*“We had to try and work out ....the forces... in the roof structure ..... The only way that they could be analysed, because the technology wasn’t there, was... (to make a model) about the size of this table, and you hung little weights from it and you measured the forces...”*

(John Nutt transcript, April 2016).

Additional site details were identified and revisited during formal interview and on-site visits which have deepened the current building team’s understanding of the complexities of this unique building.



Figure 1. “Original” Engineers: L-R: Malcom Nicklin (and his wife Marjorie Nicklin) and Figure 2. John Kuner, John Nutt and John Reid



Figure 3. Reviewing Archival material: Kerry Ross; Ron Bergin and Malcom Nicklin and Figure 4. Ian MacKenzie and John Nutt inspecting a tile –lid replica; both at the University of Sydney

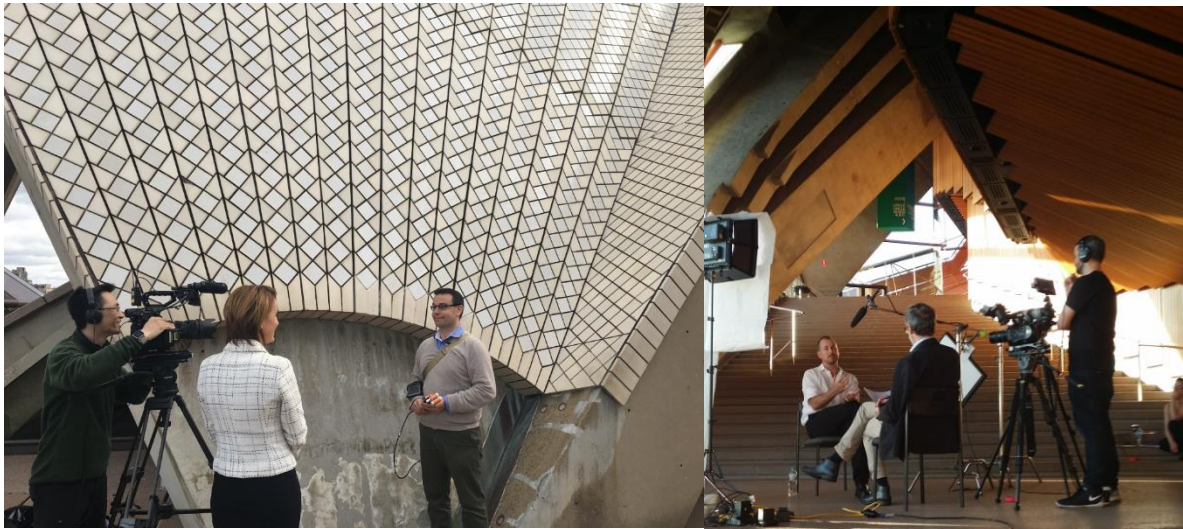


Figure 5 and 6. Filming at SOH: Gianluca Ranzi, Dean Jakubowski and Robert Griffin.

## Conclusions

The KIM grant provided an opportunity for SOH to progress conservation management in partnership with The University of Sydney, Arup and GML Heritage.

Collection of oral histories was key in identifying undocumented details related to construction methodologies and accessing archival material from private collections. The film footage will be valuable for future documentary-style productions.

The final published video *Conserving a Concrete Masterpiece* provided an overview of the project and underpinned the importance of conservation as an integral part of the culture of Sydney Opera House.

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# Tracing Back the Old Smuggling Routes in the Oura Archipelago – A Case Study on How to Make Local History Visitable

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*Research Note*

**Keywords:** heritage tourism; local history; spirits smuggling; Merikarvia; guided tour.

## Introduction

The purpose of this case study is to find out how a historian can create an event for tourists that is based on local history and takes place in the actual historical surroundings. Since 2013 I have worked in a local history project conducted by the University of Turku. The university will produce a local history of a Finnish coastal municipality called Merikarvia. One of my research themes in this project was the spirits smuggling in Merikarvia during the prohibition (1919-1932). The book will be published in December 2017. I have continued to examine the theme of spirits smuggling also in another project called *The Taste and Scent of the Sea*. The research group of this project conducts case studies on the coastal industrial heritage of Satakunta region.

As I examined the history of spirits smuggling in Merikarvia I discovered it had great potential as material for cultural heritage tourism. I wanted to organize an event that would take place in the surroundings where the smuggling took place in the 1920s and 1930s. I set out to organize a guided tour to the Oura archipelago which is located around 8 kilometers from the main harbor of Merikarvia and to trace back the old smuggling routes. Both the representative of the municipality of Merikarvia and the tour boat operator were very enthusiastic about my idea and thought it was viable. Also a project called *Sukujen silta* (The Bridge of Families) got interested about my idea and the organizers wanted to combine it to one of their events. The event took place in Merikarvia 5.-6.8.2017 and almost 200 people participated in it.

I will present in my case and answer the following questions: What are the advantages and disadvantages when a guided tour about the local history and cultural heritage is planned, organized and carried out by a historian rather than someone working in the tourism industry? What kind of additional value does the fact that the event takes place in the historical surroundings give for the people who take part in it? In the event organized in August the target customers were locals and visitors, but with some modifications this kind of event could also be offered to tourists and foreigners.

## Literature

As I was contemplating the role of a historian in creating touristic events, I turned to the works of Katriina Petrisalo and Bella Dicks. Petrisalo (2001) has conducted a case study about the past as a travel destination. She argues that the tourism industry often exploits the past by selecting and combining aspects of it and by using one's imagination to create new "traditions". In doing so the tourism industry creates a constructed past that ignores the historical chronology, the context of cultural evolution that is bound to time and place (Petrisalo, 2001, 167). My aim in creating the guided tour in Oura archipelago is to avoid creating such constructed past and to make an interesting and inspiring cultural tourism experience by relying solely on the historical facts. To reach this goal I focused on an idea presented by Bella Dicks (2003): thinking of heritage as history made visitable. Dicks argues that although the objective of a touristic event is to gather as much visitors as is suitable for that occasion and to communicate with them in a meaningful way, the

objective shouldn't imply the necessity of distortion or invention. Dicks also argues that heritage is never simply about safe-keeping the past for its own sake as it is always produced for an audience whose perspectives and desires inevitably shape its displays (Dicks, 2003, 134).

## Research

Urry (1990) has argued that the tourism industry needs tourist attractions which are unique or exotic and differ from their customers' everyday lives. The history of the prohibition time certainly is a unique part of the Finnish history and differs from the lives of people from today. That is one of the reasons why I picked it as the theme of the guided tour. Also I was told by the tour boat operator that no one else has ever done a guided tour about this theme before in Merikarvia.

As I was planning the event I had to think very carefully about what would the audience want to hear and what they would need to hear in order to understand the circumstances in which the smugglers and the authorities were living and acting. I made the decision to give first a general description on the prohibition in Finland and then to focus on the local incidents that I had discovered in the district court documents and the local newspaper. I also included in the presentation the life story of one particularly successful smuggler from a coastal village of Merikarvia.

## Conclusions

People like to hear stories, especially ones that they can somehow relate to. The strength of a historian who is producing tourism services or events lies in the ability to put things in their historical and cultural context. In doing so, the historian can make the actions of the people who lived in a certain place at a certain time *understandable*. For example most of the spirits smugglers in Merikarvia were not hardened criminals but just simple fishermen trying to make ends meet in a difficult financial situation or young adventurous men hoping to earn some extra cash. A professional smuggler was an exception in Merikarvia.

A problem which I encountered when I was planning the guided tour was that the historian doesn't necessarily have access to all important information simply because it is not recorded and stored anywhere. The crucial information to organizing this particular event was where the routes of the smugglers were located. This information I could not find in any document. I solved the problem by turning to the tour boat operator for help. He was a former fisherman and thus he was familiar with the routes of the smugglers (the smugglers and the fishermen used the same routes).

The additional value given by the fact that the event took place in the historical surroundings lies in the landscape and the transportation. The landscape hasn't changed much since the prohibition and the participants of the event could see with their own eyes how important it must have been to know the routes to be able to practice smuggling and to escape from the authorities. The amount of small islands and rocks makes it impossible for someone not familiar with the archipelago to navigate in the unmarked routes. As the tour boat operator was driving with full speed the audience also got a sense of how it must have felt trying to escape from the authorities. The actual historical surroundings enabled the participants to have an overall experience in emerging in local history.

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# Narrating City Futures: On the Formation of Sponsorship Networks and Their Role in Realising the Tourism Benefits of Hosting Cultural Mega-events

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*Research Note*

**Keywords:** European Capital of Culture; place branding; sponsorship; networks.

## **Abstract**

European Capitals of Culture (ECoC) and other cultural mega events (e.g. UK/IRE National City of Culture) have been recognised to play a significant role in a host (and candidate) city's marketing and branding strategies (Luonila & Johansson, 2015; Nobili, 2005). However, these events come at a cost. While public monies from cultural and economic development budgets make up the main sources of funding, cities are repeatedly advised to increase their funding from private sources (see EU Commission report written by Palmer & Associates, 2004). While there is extensive research on European Capitals of Culture, including their process and outcomes, sponsoring in ECoC remains under examined. The sponsorship of mega events is a special case in sponsorship, and different from potentially long standing relationships between a business and, for example, a venue, or cultural organisation. Specifically, mega events, such as ECoCs are bound in time and space, both of which play a significant role in framing the possibilities and constraints in such arrangements (See Ryan & Neville, online). In general the research on sponsoring tends to favour the examination of the event-consumer relationship, with much less work has been done on the organisation of sponsoring (see Ryan & Fahy, 2012). Sponsoring of ECoCs is an important area of study, not least because of the growing importance of private funding in arts, but also as sponsors have been observed to play a role in the ECoC year that goes well beyond funding, including participating in marketing efforts etc (Wählin, et al., 2016). We contend the formation of the sponsorship network is dependent on crafting a useful and attractive narrative of the city's future and the role of culture in this regard. In this paper we will draw on data from Limerick's National City of Culture sponsorship experiences as well and observations from Limerick's efforts to enrol support for their ECoC 2020 candidacy to consider the challenges and opportunities in forming relationships within a constrained time/space context, and the nature and role of interaction and relationship building in this regard.

*“Being a European Capital of Culture brings fresh life to these cities, boosting their cultural, social and economic development. Many of them, like Lille, Glasgow and Essen, have demonstrated that the title can be a great opportunity to regenerate their urban centres, bringing creativity, visitors and international recognition”.*

(2016 EU Commission fact sheet)

European Capitals of Culture (ECoC) and other cultural mega events (e.g. UK/IRE national city of culture) have been recognised to play a significant role in a host (and candidate) city's marketing and branding strategies (Luonila & Johansson, 2015; Nobili, 2005; Garcia, 2004; Jones & Wilks-Heeg, 2004; Richards & Wilson, 2004). Private businesses are heavily implicated in the realisation of a successful ECoC programme (Wählin, et al., 2016). For example, businesses have a vested interest in the city branding, as those cities with good reputation for high quality of life will be attractive to prospective employees, due to the well-being effects of a vibrant cultural sector (Westand Scott-Samuel, 2010). In short, when the city/region benefits, so too do private businesses. The 'quid pro quo' for this 'rising tides' is that businesses should become supporters of

the programme. Indeed the Commission require ECOC cities to collaborate and generally reach out to the business sector and other stakeholders. This is for reasons such as of developing good relations between business and the arts and accessing and developing audiences. But a primary interest to the ECOC city/region for developing such relationships will be financial reasons. For while public monies from cultural and economic development budgets make up the main sources of funding, cities are repeatedly advised to increase their funding from private sources (see EU Commission report written by Palmer and Associates, 2004); specifically in the form of corporate sponsorship. Therefore generating private sponsorship incomes is critical to the success of ECoC cities. Sponsoring of ECoCs is an important area of study, not least because of the growing importance of private funding in the arts, but also as sponsors have been observed to play a role in the ECOC year that goes well beyond funding, including participating in marketing efforts etc (Wåhlin, et al., 2016). While there is extensive research on European Capitals of Culture, including their process and outcomes, sponsoring in ECoC remains under examined. In this short research note our aim is to explore the interrelationship between commercial sponsorship, sponsorship networks and place branding.

Corporate sponsorship can be understood to be an economic exchange between a sponsor and sponsee whereby the sponsor invests both financially and non-financially in an activity, organisation or a person thereby earning certain rights of association. According to Meenaghan (1991, p. 10) the sponsor is 'buying' two things "*one, the exposure potential that the activity has in terms of audience, and two, the image associated with that activity in terms of how it is perceived*". Furthermore sponsorship forms the context for further communication of the association by both parties, a concept termed by Cornwell (1995) as Sponsorship-Linked Marketing. This essentially frames sponsorship as a triadic relationship, whereby the arts organisation facilitates the relationship between sponsor and the company's customers (i.e. the audience). The research on sponsoring tends to favour the examination of this triadic sponsor-event-consumer relationship, with much less work done with regard to the (collective) network interactions *between* event sponsors (see Ryan & Fahy, 2012). The interest in the sponsor-event-consumer relationship is due to both sports and arts events, by their nature, engender powerful consumer experiences (Freeland, 2003; McCauley, 2004), and include a high level of emotional involvement on the part of participants and fans. The potential to integrate a sponsored brand with the social, hedonic, and sacred meanings attributed to a sport or arts event is regarded as significant (Meenaghan, 2002). The direction of interest in this research then is the transfer of meaning from the event-fan/consumer interaction to the sponsor's brand. Specific brand equity benefits potentially include; "communication of brand personality, differentiating the brand from competitors, developing an image of quality and brand loyalty (Cornwell et al., 2001, p. 42). However, this is not a direct relationship and requires intermediary action on the part of the sponsor. For example, while McDonald (1991) suggested that sponsorship may only have a peripheral impact on the transfer of brand image, due to the indirect nature of sponsorship stimuli (Meenaghan, 1991), Cornwell et al (2001) propose that with increased managerial involvement and sponsorship-linked marketing (Cornwell, 1995) that more specific brand equity benefits may be accrued alongside more general brand benefits such as awareness of brand and corporate image in a general sense. Increased managerial involvement relates to the development of corporate sponsorship policy and initiation of sponsorship activities, including sponsorship-linked marketing, on the part of the sponsor. Research on sponsorship has tended to focus then on either the consumer relationship with the event, or the managerial efforts required to maximise the potential of this relationship.

An alternative perspective has been that considering sponsorship relationships and networks and their role in realising sponsorship benefits. A relational approach to sponsorship not only broadens our notion of what sponsorship is, but it also serves to fore-ground the intra-organisational and inter-organisational context from which broad range of objectives and opportunities can be derived (Ryan and Fahy, 2012). This is particularly true in the context of cultural mega events where the emerging network of sponsors/ supporters becoming a kin to a 'cohort' or network of actors with the possibilities for cross organisational learning and sponsorship capacity building in a specific time and place. At the same time, sponsoring of ECoCs is also receptive to high emotions, including 'pride of place'. This can be seen from the time of a city's bid to become a capital of culture, right through to its realisation. While the role of fan/consumer meanings during an arts event in sponsorship has been explored, we know less of the impact of 'pride of place' and other emotional

triggers on sponsors themselves, and specifically on the interaction between sponsors and private supporters, as the move from backing a bid to becoming formal sponsors or suppliers to the event.

In this paper we understand 'place' as diverse, fragmented and socially constructed spaces (Lichrou et al., 2010; Hannah & Rowley, 2011) that actively shape their own future (Saraniemi and Kylänen (2011, p. 138). From this perspective place identity, as enacted in and shaped by cultural mega events, can be regarded a collective endeavour which, according to Hannah and Rowley (2011, p. 468) 1) expresses the distinctive characteristics that the stakeholders ascribe to a place, 2) provides a framework for overall coherence, and 3) monitors means of expression" (Hannah & Rowley, 2011, p. 468). In this regard, place branding is best conceptualised as a dialogue between a location's market actors, where through iterative interactions between multiple and varied network stakeholders the brand is enacted; and as such also shapes action (Onyas & Ryan, 2015). We contend the formation of the sponsorship network is dependent on crafting a useful and attractive narrative of the city's/place's future and the role of culture in this regard. As such, the building of a sponsorship network, and encouraging collective action between sponsors, will shape the nature of the place brand in the context of their ECoC activities. In forming a sponsorship network, the event organisers are tasked with articulating a vision for the city/region's future which the private businesses can share and contribute to, alongside a diverse range of other stakeholders of the project. As such the enrolment of sponsors becomes less about 'selling' the potential of involvement in any one cultural event or project, but is framed instead as an investment in the city/region itself; of encouraging and harnessing the benefits of pride of place. This comes with the need to frame the sponsorship of cultural mega events as a *collective effort* to realise the future potential of the city/region; and not just highlighting the benefits for any one organisation or even sector. This collective, future orientated framing in the enrolment of sponsors marks it as a special case in sponsorship. We contend that harnessing the existing pride of place towards enabling private actors to co-create a vision of their city's future contributes to the literature on ECoC, which as heretofore emphasised the role of these mega events in reframing/rebranding places, resulting in a revitalised pride of place (e.g. Bailey, et al., 2004). Instead here we see such pride as an input to sponsorship network formation.

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# Combining Ecological, Economic and Cultural Sustainability in the Development of Science Tourism on the Seili Island

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*Research Note*

**Keywords:** science tourism; sustainable development; economic sustainability; ecologic sustainability; cultural sustainability.

## **Abstract**

The current study examines the development of science tourism and its contribution to economic, ecological, and cultural sustainability of a tourism destination. We conduct the research in a demanding cultural and natural environment on the Seili Island in the Archipelago of Southwest Finland. Seili has a long hospital history as lepers were relocated to the island already in the medieval times. The first hospital was built in the 17th century and the current main building, which is from the 19th century, hosted mentally afflicted patients. After the hospital was closed down in the 1960s, the Archipelago Research Institute of the University of Turku established a biological research station on the premises. Thus, Seili has a rich and distinguished cultural and natural heritage and established scientific activities. It has become an attractive tourism destination with nearly 10 000 annual visitors. The University of Turku has established a plan to develop science tourism on the island and initiated cooperation with the tourism industry. This will increase the amount of tourists significantly, which has created a lot of critique in the local media, highlighting the need for a sustainable approach in the tourism development.

Scientific tourism dates back to the 19th century and refers to tourism activities conducted by researchers and students for scientific purposes. Science tourism, in turn, is understood as a wider phenomenon related to eudaimonic tourist motivations (e.g. learning and self-actualization), reflecting the principles of the experience and transformation economy in which consumers search meaning through self-enhancement and intellectual growth. The experiential value of science tourism lies in active participation in scientific research or more passive involvement in science or education.

Our idea is to develop sustainable science tourism on the Seili Island and analyze the economic, ecological, and cultural effects of the increasing tourism activity. On a more theoretical level, the goal is to investigate how the topical understanding of three distinct and partly contradictory forms of cultural sustainability (Dessein et al., 2015) could be combined in a co-creation process of scientific tourism in order to promote sustainability and the wellbeing of both humans and nature in the Archipelago. Through developing science tourism in this participatory process, we aim at sustaining the continuity of the core values of cultural and natural heritage and strengthening the intermediating and transformative roles of culture towards sustainability in its different dimensions.

## **Introduction**

The current study examines the development of science tourism and its contribution to economic, ecological, and cultural sustainability of a tourism destination. We conduct this multidisciplinary research in a demanding cultural and natural environment on the Seili Island in the Archipelago of Southwest Finland.

Seili is known for its long hospital history. Lepers were relocated to the island already in the medieval times and the first hospital was established in the 17th century. The current main building is from the 19th century

and hosted mentally afflicted patients. When the hospital was closed down in the 1960s, the Archipelago Research Institute of the University of Turku established a biological research station on the premises. Thus, in addition to rich and distinguished cultural and natural heritage, Seili has established scientific activities.

Over the years, Seili has become an attractive tourism destination with nearly 10 000 visitors during the summer months. The visitors are mainly same-day visitors due to the lack of hospitality services and a camping ban. The University of Turku has, however, organized seminars for students and researchers for a long time. In 2017, the university initiated cooperation with a private tourism company and, as a result, accommodation and restaurant services are now available. Consequently, the amount of tourists will increase in the future to estimated 40 000 annual visitors. This has led to emotional opinions and even fierce critique in the local media (e.g. TS 2.1.2017; TS 14.1.2017; TS 1.2.2017), highlighting the need for a sustainable approach in the tourism development.

### **Science Tourism Experiences**

While science and tourism may seem like an unusual collocation, there is a subsequent logic to their combination, emphasized through the historic roots of scientific travel to broaden knowledge and comprehension of the world (Holden, 2015). Scientific tourism is traditionally understood as tourism activities conducted by researchers and students for scientific purposes (cf. Slocum, Kline, & Holden, 2015). International travel for scientific enquiry dates back to the 19th century, when the desire for 'discovery' characterized both tourism and science, and colonialism and economic growth enabled scientific exploration beyond the European core. Despite the long history of scientists as tourists, scientific tourism is quite scarcely researched and still lacks clear definition. (Holden, 2015.)

Moreover, scientific knowledge is a significant tourism resource and tourist motivation also in a wider context of tourists visiting scientific landmarks, such as universities, museums, laboratories, and observatories (cf. Bourlon & Torres, 2016). This wider notion, referred to as science tourism, seems to be even more scarcely researched yet considered as a sub-category of nature-based or cultural tourism (Hall & Saarinen, 2010).

Even though academic heritage and scientific knowledge has received little attention in the previous literature, learning has been extensively discussed in relation to tourism experiences (e.g. Pine & Gilmore, 1999; Walter, 2013). An experience refers to something that affects the way an individual feels and, in tourism literature, experiences are often described as positive, emotional, and memorable (Pine & Gilmore, 1999; Sundbo & Darmer, 2008). To experience, in turn, refers to the process of getting knowledge or skills from doing or sensing something, which makes learning a focal component of tourist experiences (e.g. Walter, 2013).

Tourists, however, very rarely describe their emotional experiences as learning experiences (Räikkönen, 2007; Räikkönen, 2014). This is somewhat surprising as science tourism obviously follows the logic of the experience economy in which consumers want to acquire an interesting life, to experience new places, be entertained, and learn in an enjoyable way (Pine & Gilmore, 1999; Sundbo & Darmer, 2008). The transformation economy takes one step further as consumers pursue not only emotional experiences but more permanent personal transformations (Pine & Gilmore, 1999; Räikkönen & Grénman, 2017).

These ideas coincide with the discourses on the needs and motives of consumers, operations and offerings of service providers, and their mutual interactions in which value is created (cf. Alsos et al., 2014). In science tourism, the transformations are closely related to eudaimonic tourist motivations, such as self-actualization and intellectual growth, and the experiential value lies in either active participation in scientific research or more passive involvement in science or education (cf. Konu, 2016; Ryan & Deci, 2000).

### **Economic, Ecological and Cultural Sustainability**

In this multidisciplinary research, we examine science tourism development from the perspective of sustainable development. The definitions of sustainable development generally include economic, ecological as well as social or cultural sustainability. In tourism research, the last two dimensions are often combined

into socio-cultural sustainability (Hall, Gössling, & Scott, 2015). In addition to economic and ecological sustainability, we focus on cultural sustainability, emphasizing cultural sustainability as an independent factor among other dimensions of sustainability, but tightly connected to social sustainability. First, cultural sustainability can be seen as the fourth dimension of sustainability and, in this case, sustainability is often understood as continuity, focusing on different cultural issues. Second, cultural sustainability can be understood as a transformative process in which culture functions as a support to and a mediator between other dimensions of sustainability and, third, as a transformative power towards sustainability in all of its dimensions (Dessein et al., 2015). As a support and a mediator, different elements of culture, e.g., identities or art, are used as tools in reaching different sustainability targets, such as economic and social wellbeing. When culture is considered as a transformative power, the focus is in the basic characteristic of culture, i.e. change. Accordingly, cultural changes are intentionally directed towards targets which are understood to be sustainable.

Even though the dimensions of sustainability are often discussed as distinct entities, they are deeply interconnected. For instance, the intricate relations between biodiversity and culture can be captured by the concept of 'bio-cultural diversity' which emphasizes the adaptive connections between nature and people and, thus, the significance of hybrid landscapes (Harmon et al., 2010; Dessein, 2015). In order to confirm the holistic understanding on sustainability, the current research is conducted in cooperation with various researchers of the University of Turku (Turku School of Economics, Biodiversity Unit, Finland Future Research Centre, and Faculty of Humanities). Our core idea is to investigate if and how the topical understanding of the above-described three different and partly contradictory forms of cultural sustainability (Dessein et al., 2015) could be combined in a co-creation process of scientific tourism to promote sustainability that is the wellbeing of both humans and nature in the Archipelago. Correspondingly, both the continuity of the core values of cultural and natural heritage as well as the possibilities to strengthen the intermediating and transformative roles of culture towards sustainability in its different dimensions are developed together in a participatory process of scientific tourism.

### **Research Design**

In the current research, Seili forms a case example and a test laboratory for sustainable science tourism development. The study gathers multidisciplinary experts from the University of Turku i) to take part in developing science tourism and integrating different perspectives of sustainability into the planning and development process and ii) to analyze the economic, ecological and cultural effects of increasing tourism activity in order to make sure that the carrying capacity will not be exceeded. The study applies multiple qualitative and quantitative methods, for instance action research method (Greenwood & Levin, 2005) and participatory workshops are used in the development process and observation, interviews, and surveys in analyzing the economic, ecological and cultural implications. The economic sustainability relates to the demand and value creation in science tourism as well as the business logic and organization. The ecological sustainability is analyzed by follow-up studies on four selected areas that are subject to, e.g., erosion. The cultural sustainability, in turn, consists of mainly qualitative methodologies, such as interviews, discussion groups and future workshops and processes conducted with the shareholders.

### **Results and Discussion**

As the research is in a very early phase, we can provide here only anticipated results. We have started the literature review on science tourism and sustainable tourism development. The survey on the potential of science tourism will be conducted in July-August 2017 in order to have an understanding on the interest towards science tourism products for different customer segments. The ecological and cultural parts are progressing as well. During the summer 2017, a research associate collects and analyses data on the current state of the environment on Seili. The university has already organized two events for the shareholders to discuss and share views on the tourism development and the local association, Pro Själö ry, has organized one event. After the first tourism high season, we will have some very preliminary results on all aspects of sustainability.

Besides concrete ideas for practical science tourism development on Seili, this research has contribution also in a wider academic context. Seili is a small island with unique culture and distinctive nature. The amount of tourism actors is very restricted and the university is the main player in the development of the island. This makes Seili an ideal laboratory for research on science tourism and sustainable tourism development. In the following years, we will be able to draw conclusions on the sustainable tourism development and the experiential value creation of science tourism. In a long run, we aim to include tourists to not only co-create science tourism experiences but also to co-create the processes that shape the future of Seili. In other words, the tourists do not only transform themselves through tourism experiences but are also active in transforming the destination they visit.

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# The Importance of Everydayness: A Sustainable and Inclusive Approach to Heritage

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*Research Note*

**Keywords:** everydayness; heritage; knowledge systems; inclusive; sustainable.

## **Abstract**

In any given context, with a wide variety of heritage, ranging from varied time periods, architectural styles, scale and complexities, it becomes critical to recognize the different types of heritage which the communities and people associate themselves with and address the challenges within the legal system of the state, before we take steps to promote related tourism activities and cultural products. Presently, the idea of “heritage” and tourism is largely limited to iconic and celebrated historic buildings and spaces. While there has been a shift in focus towards rural tourism and vernacular traditions, its presentation remains limited. This has led to a lack of recognition of the tangible and intangible attributes of buildings and areas which render and define their cultural / historic heritage values. This paper argues that what is dismissed as the ordinary is integral to the local meanings and narratives of these historic sites. The recognition and holistic, integrated understanding of the sites / settings incorporating their cultural, natural and built elements can facilitate our understanding of local knowledge systems, which have sustained these cultural and built traditions for long periods.

The paper presents an inclusive approach and framework to understanding and appreciating “heritage” places and landscapes. To this end, I will discuss the case of Mandawa, an 18th Century trade settlement in Rajasthan, a popular tourist destination in North-West India. In contrast to the current approaches towards tourism in Mandawa, I will propose a sustainable approach which reckons with the role of the local and municipal bodies as well as the existence of knowledge systems and traditions. My approach recognizes the various “systems” and traditional knowledge that contribute to the cultural and heritage value of a site like Mandawa. Based in this knowledge of long standing community-based practices, it offers sustainable solutions for conservation and management of heritage resources. The approach sketched in this paper also reinforces the strength and value of these knowledge systems and cultural components. As it creates conditions for communities to their practice of these systems, the proposed approach promises an improved tourist experience which is respectful of and rooted in local practices.

## **Background**

In the Indian context the idea of historic places is dominated by the iconic and monumental examples such as the Taj Mahal in Agra, the Red Fort in New Delhi, and the Ajanta and Ellora caves in Maharashtra. India boasts of nearly 36 world heritage sites, out of which at least 27 are cultural sites. The grandeur of these iconic buildings attracts both national and international visitors. However, the long history and the variety of natural and built components that represent different time periods, which are also found in these sites and settlements, have not received the same enthusiastic attention.

In light of international discourses on defining and recognizing heritage, even in India, there has been a shift in focus towards rural tourism and vernacular traditions. However the understanding and representation of the same is limited. It must also be noted that India has been among the original members of the United Nations that signed the Declaration by United Nations at Washington, D.C. on 1 January 1942 and in line with UNESCO Convention (World Heritage), 1972, each State Party to this Convention recognises that the duty of

ensuring the identification, protection, conservation, presentation and transmission to future generations of the cultural and natural heritage referred to in Articles 1 and 2 and situated on its territory, belongs primarily to that State. It will do all it can to this end, to the utmost of its own resources and, where appropriate, with any international assistance and cooperation, in particular, financial, artistic, scientific and technical, which it may be able to obtain. Therefore, the issue of understanding/ defining, safeguarding and managing historic buildings post-independence needs to be examined with respect to the developments both internationally and nationally in this regard (post 20th C AD).

Notable conventions, declarations and documents such as Venice Charter, Burra Charter, Amsterdam Declaration and Rio Declaration have brought about an international standard and approach towards culture and sustainability. As such, these conventions have broadened the vision to include many sectors that were hitherto seen in isolation. The above mentioned steps in standardization of sustainability practices have also brought about an awareness of development, disasters, environment, and climate change discourses in the context of culture.

As a result, the understanding of heritage is gradually reckoning with the complex inter linked systems which have survived over centuries, and is no longer limited to built components only. In India as well, there have been attempts to redefine heritage in the light of international developments and discourse, hence bringing a new complexity. However, it is imperative that while we follow the international framework we should contextualise this for Indian system and culture.

### **Problem Statement**

Heritage discourse in Indian context still tends to focus on the sites and monuments of national and international / universal importance. It not only does not acknowledge or understand, but also further undermines, the aspects of sites, setting and communities that are integral to the history and legacy of the place. This problem has some far reaching impacts. It isolates local communities, increases social and economic inequalities due to disproportionate funding and economic support without understanding the needs, loss of knowledge systems. Ultimately, it spells slow death for heritage and associated practices.

Lately, there have been attempts by informed groups of professional as well as vigilant citizens towards exploring and conserving the aspects which they think are integral to their shared histories.

Still, there remains a pressing need develop a framework which is inclusive, based on sustainability of cultural resources, and not just individual buildings and sites. This will enable users and policy makers to identify and assess the elements rendering values. Hence, it will foster appreciation and acknowledgement, which will in turn lead to the conservation of these attributes.

### **Literature Review**

The rationale for selecting documents for study and review is primarily to inform the following:

1. How to define heritage in the light of shifting / evolving discourse towards a more holistic understanding of the same - Diversion from monument centric approach.
2. Contextualising understanding of the same in Indian context.
3. Applicable approaches and methods towards addressing concerns of 'ordinary'/ less monumental heritage.

World view - International discourse: According to the "Charter on the Built Vernacular Heritage (1999), Ratified by the ICOMOS 12th General Assembly, in Mexico, October 1999 ", the built vernacular heritage is "the fundamental expression of the culture of a community, of its relationship with the territory and at the same time, the expression of world's cultural diversity ". Still, it leaves us with the questions: how do we define and identify the vernacular heritage in any given context? Since the understanding of heritage is also inclusive of intangible and natural aspects along with built, what are the parameters based on which natural

and built heritage should be qualified? And, perhaps most importantly, what about the heritage should we be conserving?

Indian context: As per the UNESCO, each state party should work out the conventions in their context to modify and develop its national policies. This is a healthy way of working and it will also help use to guard the national interest. However, in the Indian context, we must realize that our country's systems are not so developed. The protection and management of cultural resource is posed with numerous practical and theoretical challenges. One of the most important laws pertaining to heritage is the 1958 Act / AMASR Act refers to The Ancient Monuments And Archaeological Sites And Remains Act 1958 (No. 24 of 1958), which is centred on the monument. This Act defines ancient monument as any erection or structure or monument or tumulus or place of interment, or any cave, rock sculpture, inscription or monolith which is of historical, archaeological or artistic interest and which has been in existence for not less than 100 years.

At the same time, while the approach of the existing legal system is still very monument-centric, there have been efforts by leading academic institutions and government agencies to expand the purview of what is considered "heritage" in the Indian context. The voluntary sector in India has played a major role in rural development, through mobilizing communities and catalyzing people's initiatives for change, as well as through the direct implementation of case specific interventions.

Gap identification and the need to intervene: In this context, there is a pressing need to develop a framework which is inclusive and based on sustainability of cultural resources. We need a framework that makes it possible for users and policy makers to identify and access the elements/ physical attributes rendering values. This move will foster appreciation of these attributes and lead to their conservation. With this goal in mind, the proposed methodology is focussed on identification of elements through a value-based framework.

Proposed approach: The author proposes a 'systems based approach' towards understanding and identification of aspects / attributes rendering 'values' and hence significance. This will enable the users/stakeholders to qualify and define heritage for their own context.

To this end, I will focus on a typical example of 18th C trading settlement, in the North-Western Indian state of Rajasthan. This settlement is set in desert ecology and has recently come to limelight as a popular tourist destination being in proximity to Delhi, the capital of India. As a result, the area has experienced high tourism and developmental pressures lately. It is also a part of the developmental initiatives by the government. As such, it provides a perspective on the government's approach to and understanding of issues related to heritage and sustainable development.

## Case Study

History of Mandawa: As a part of Shekhawati region in Western India, Mandawa was a feudal principality and a major trading outpost for ancient caravan routes that stopped on their way from China to Middle East.



Figure 1. Location of Mandawa

Established as a *thikana* or principality in mid-18th C AD, it flourished to be one of the most prosperous trading town of Shekhawati region under Thakur Nawal Singh, who is also credited with the construction of the main fort in 1755 to protect the trading post. At present, it is a popular tourist spot known as the Castle Mandawa.

In spite of difficult living conditions, the towns in Shekhawati region such as Mandawa, Nawalgarh, Mukundgarh, Khandela, among others, flourished for centuries and were shaped by the political conditions, trade and commerce, cultural exchange, as well as the adaptability and innovations by the native population.

In the latter half of 18th century when Jaipur (present day capital of Rajasthan state) emerged as an important trade centre, it was still politically unstable and had an overburdened treasury. These factors forced the subsequent Jaipur rulers, who had earlier promoted trade, to impose heavy taxes in their territories. The rulers of Bikaner, nearby princely state, followed suit. Shekhawati, which was then ruled by Thakurs, was quick to take advantage of this situation providing a detour to caravans, facilitating access, and greatly reducing taxes on trade through their territories. Thus trade was largely diverted from main centres such as Jaipur and Bikaner States towards routes leading to Shekhawati. Thakurs encouraged merchants to settle in their newly established towns promising them economic benefits and security. Improved financial condition of the Thakurs treasury provided necessary economic impetus for a great era of building activity in Shekhawati. The years between 1740 A.D. and 1800 A.D. witnessed a proliferation of settlements. As a result, the region is associated with almost all leading business families in India and the majority of contemporary industrial connections.

Traditionally, trader groups or communities, contributed to the development of the a town or a part of it, both from business as well as philanthropic interests Shekhawati occupied the old trade route between West Asia and the sub-continent of which water was a vital part. The *seths* (merchants) of times built complexes with a tank of water, a temple and a well, many of which survive today in the desert. Development in Mandawa can be attributed as much to these rich merchant families as to the royal family. While Thakurs of Mandawa built the iconic fort, popular as Castle Mandawa today, the town is equally famous for its painted *havelis* built by these merchants. The elevated economic status of these families is reflected in the architectural disposition and artistic expression of the merchant houses. It is symbolic of their cultural and social clout.



Heritage hotels – with art forms and traditional architecture



Streetscapes



Painted Havelis



Frescos on street facade



Local crafts – Rugs and paintings



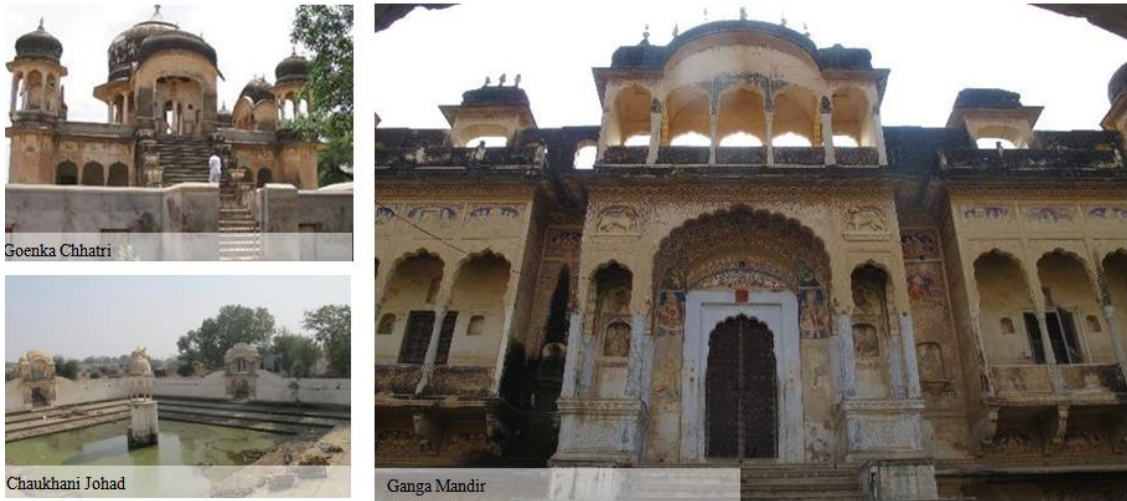


Figure 2. Built legacy of Mandawa

The Marwari merchants amassed huge wealth and embarked, competitively, on constructing large havelis, temples, cenotaphs, caravan sarais, wells and water tanks in their home town. They commissioned painters to decorate these structures with frescoes on an unprecedented scale. Local masons, sensing increased demand for frescoes, quickly learnt the art form thereby bestowing Shekhawati with a rich heritage. Apart from the building crafts and frescos, Mandawa and Shekhawati region also had the following crafts patronised by the rulers and Marwari merchants, some of which continue to exist even today, though highly commercialised, such as bangle making, wood work, mirror work *et cetera*.

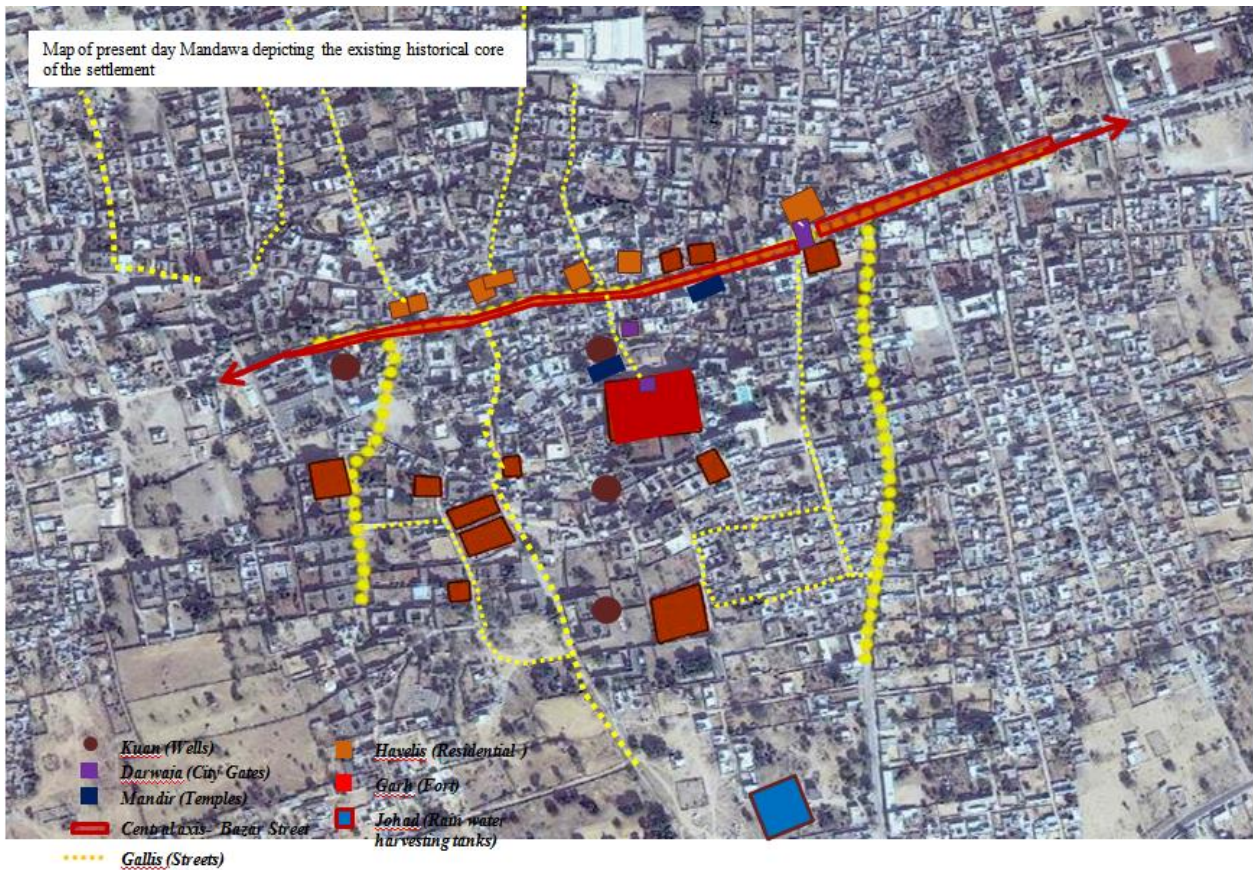


Figure 3. Surviving crafts

However, 19<sup>th</sup> century onwards, when the ancient Silk Road that criss-crossed Mandawa began to be eclipsed by the steamship and the railway, the Marwaris fled the desert for the flourishing port of Calcutta, which was the centre of development at the time. A large number of merchant families gradually moved out Mandawa, leaving their built legacy behind, which presently stands witness to its opulent past.







**Elements of historic settlement**

1. **Garh**- Mandawa Fort now Hotel castle Mandawa
2. **Darwaja**- Fort Gates and Sonthaliya Gate
3. **Kuan**- Harlal Ka Kuan, Sarafa Kuan, Goenka kuan etc.
4. **Johad**- Chokhani ka Johad
5. **Mandir**- Ragunathji ka Mandir
6. **Gallis, Mohallas**
7. **Main Bazaar Street**
8. **Painted Havelis**



Garh - Mandawa Fort  
A fort was built at a strategic location forming the nucleus of the town.



Chauk in residential area



Darwaja-Sonthaliya Gate  
Gateways were built in different directions leading to main cities – only 20th century Sonthaliya gate survives



Gallis/ Mohallas  
Narrow gallis punctuated by chowks and havelis forming the built fabric of the town



Traditionally styled shops in the main bazaar



Historic water harvesting structures



Chauk in bazaar

Figure 4. Historic core & landmarks

Impact of tourism: Till recent past, when Mandawa made it to the tourist map, it was a typical small scale settlement with rich cultural legacy. However, emigration of original communities had slowed the progress of the settlement due to lack of patronage. Large residential buildings, community infrastructure such as *dharamshalas* and wells lay unattended. This negligence led to their poor condition.



However, the trend of converting heritage buildings into hotels caught up in the last two decade in Shekhawati. The aggressive marketing by tour operators coupled with the liberal policies of government have given an impetus to tourism in the region, including Mandawa. The fort at Mandawa was converted into heritage hotel in year 2000. Since then it has been attracting a large number of tourists every year.

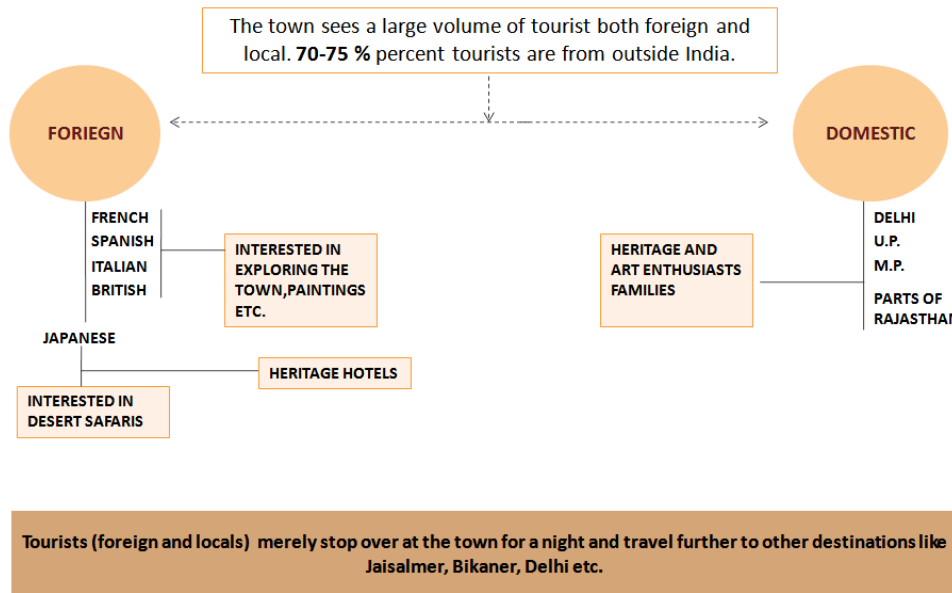


Figure 5. Tourism profiling

Once a part of the 'Rajasthan Silk route Destination' circuit (Delhi-Mandawa-Nawalgarh-Samode-Jaipur-Delhi), Mandawa suddenly graduated from a small market town to one of the most popular tourist spots in the region. Though tourism is one of the main drivers for development in Mandawa today, the shift to tourism-based activities has alienated the local communities from their cultural legacy. In an effort to showcase the best for the tourist, largely international, unfortunately, a lot which is considered less important or 'everyday' has remained sidelined. These mundane aspects of the site, however, are as much characteristic of the spirit of the Mandawa Castle as the iconic built structures.

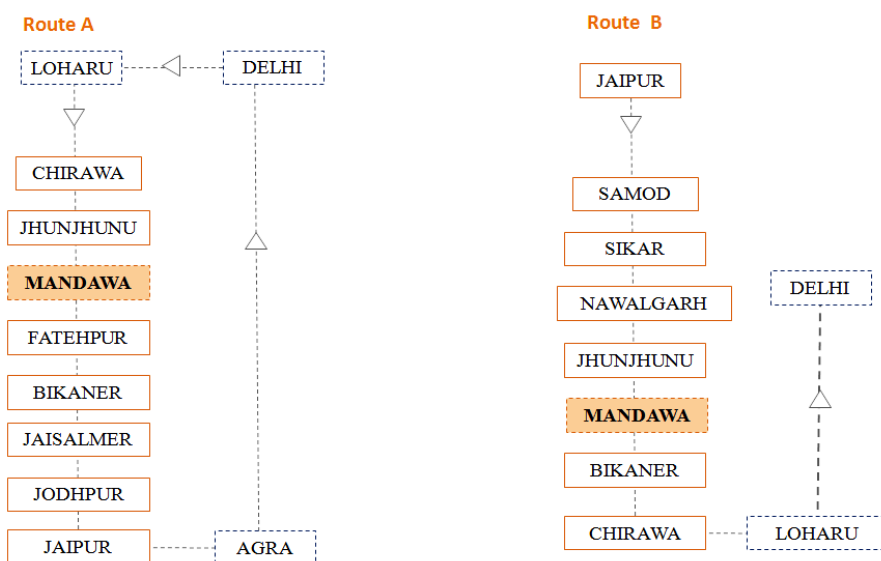
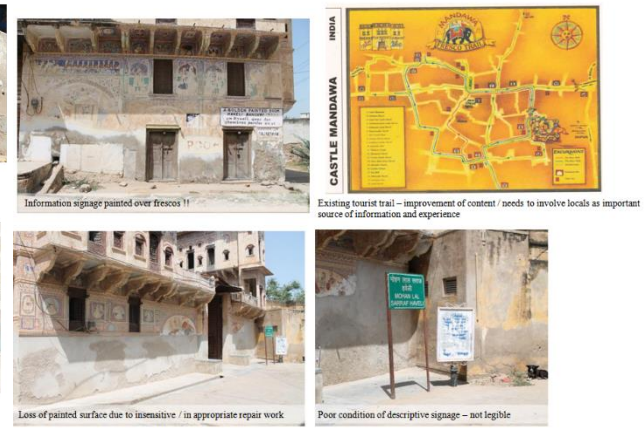
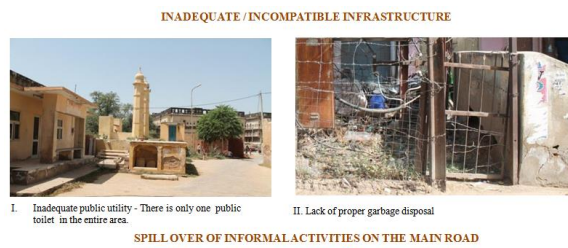
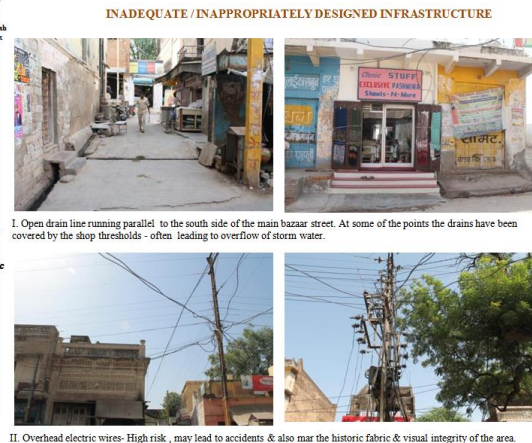
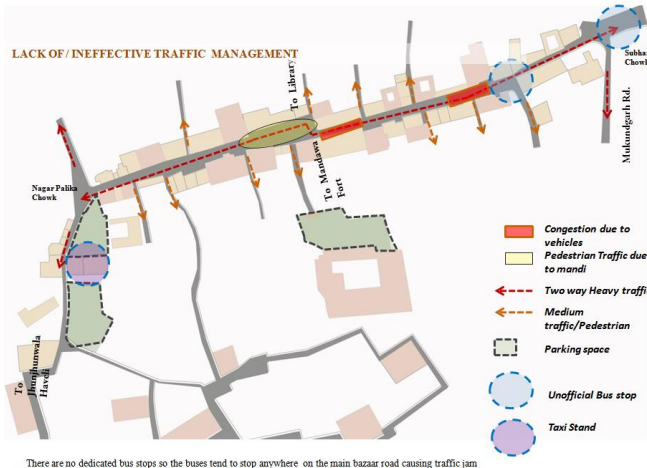


Figure 6. Tourist circuits

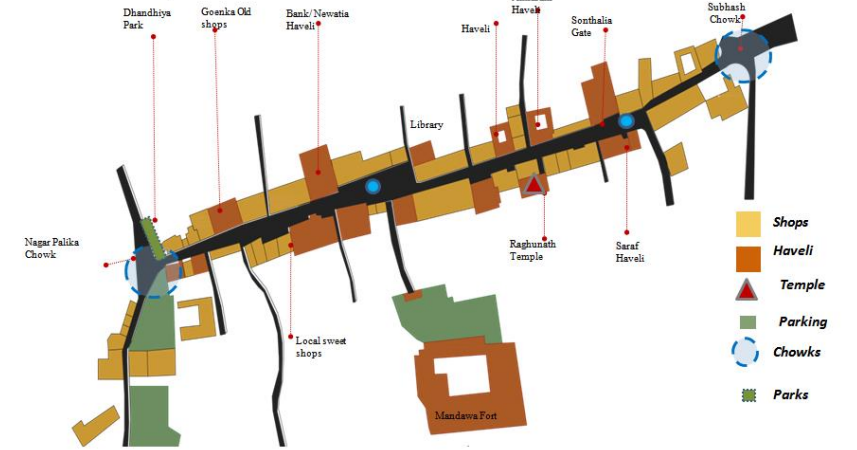
The settlement has also been featured in Bollywood films, which has further boosted tourism. Unfortunately, this greater visibility of Mandawa has led to rapid economic-social and cultural transformation, which in turn has created the need for tourism based support services, infrastructure, and employment. In the absence of strong control/ guidelines by municipal agencies and efficient community level self-governance, it may have a negative impact on the character and quality of physical and cultural environment of Mandawa. Thus, it can jeopardize the long term sustainability and erode the 'values' of Mandawa. (Insert)

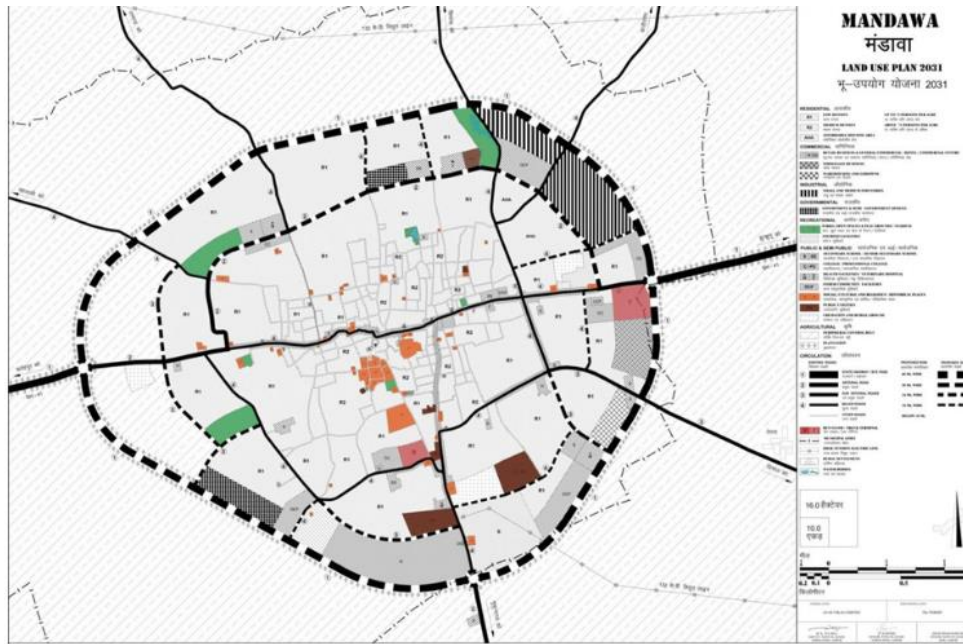


**LACK OF TOURIST ORIENTATION FACILITY & SUPPORTING INFRASTRUCTURE**

I. No information about historic buildings along the bazaar – only a few *havelis* have signage but not legible

II. Under developed & under utilized (not integrated) traditional open spaces & public areas such as those in form of large *havelis* and high 'thadas' of traditional shops.





The Master Plan 2010-31 fails to understand the historic core and its issues in a holistic manner- Though there are efforts to address problems at settlement level – Solutions are only piece meal

Figure 7. Status of built & natural heritage

The effects of this trend, which may continue for long, are already visible. There is gradual loss of connection between the inhabitants and their cultural heritage due to emigration and immigration of communities from nearby areas for work. This lack of ‘belonging’ has disturbed the community level interaction and functionality. Lack of recognition of ‘heritage’ (not just monumental) is leading to the neglect—hence disrepair and decay—of historic buildings such as the havelis, water structures, and other community structures. The absence of guidelines for development and the growing desire to exploit tourism potential has encouraged haphazard development, which compromises the character of the place. Historic buildings are rapidly being converted into heritage hotels and modern infrastructure is superimposed insensitively above the existing ones to cater to increased tourist footfall.

Ironically, while making sincere efforts to appease the tourists, the basic requirements of the residents and the understanding of the historic character of Mandawa are being compromised. This, ironically, only creates a negative impact on the tourists!

There is complete absence of waste management and effective drainage system at settlement level. The quality of open spaces is also degrading, and community spaces and cultural nodes are either lying underutilised or area gradually being encroached leading to loss of character. Increased vehicular traffic in an otherwise streets meant for pedestrians creates bottlenecks during peak business hours.

Apart from the issue related to the sustainable tourism management and the conservation of the cultural fabric of Mandawa, there are more pertinent developmental challenges which need to be addressed. These include education, role of women and employment generation especially for youth to check out migration. All these challenges require dedicated interaction with the communities to understand the challenges. Any and all conditions for sustainable culture centric development can only be based on this interaction. It is only then that our frameworks will be responsive to community needs and will make them self-reliant.

### Proposed Approach:

It is imperative to understand that sustainable transformation of Mandawa from historic rural trading settlement to an important tourist town can only be done with the insight, support and goodwill of the local communities. The knowledge systems which have been sustaining the development for centuries in adverse

climatic conditions are the key to the addressing conservation and heritage challenges while paving way for sensitive developmental and tourism activities.

A value based approach to identify attributes which render values and significance—and makes a cultural or natural asset important for the communities / stakeholders—should be adopted along with the associated systems and practices. This approach is illustrated below as a template which may be applied to seek the linkages and attribute values. However, it is imperative that this template be modified based on case specific conditions, though broadly the structure and main heads can be constant.

Table 1

Components of the historic settlement Mandawa:	Values attributed	Associated communities	Local / native practices associated with conservation & management	Associated crafts / trade etc
1. Cultural				
1a. Built				
<i>Fortification Wall</i>				
<i>Bastions</i>				
<i>City Gates</i>				
<i>Residential buildings - Havelis</i>				
<i>Palatial building- Garh / castle</i>				
<i>Residential cum commercial establishments</i>				
<i>Bazaar or commercial streets</i>				
<i>Mandi - Market for mainly agricultural produce</i>				
<i>Haat - weekly market</i>				
<i>Gallis/ streets</i>				
<i>Mohallas / neighborhood</i>				
<i>Chowks / Squares</i>				
<i>Chabutras / platforms at street intersection for resting</i>				
<i>Well or kuan</i>				
<i>Johad - Tanks for rainwater harvesting</i>				
<i>Tibara</i>				
<i>Dharamshala</i>				
<i>Religious structures such as temples etc</i>				
2. Natural				
a. Terrain				

Components of the historic settlement Mandawa:	Values attributed	Associated communities	Local / native practices associated with conservation & management	Associated crafts / trade etc
<i>b. Natural stream</i>				
<i>c. Native forest or beed</i>				
<i>d. Fallow land</i>				
<i>e. Grassland / charagah</i>				

The Table Aims to answer the followings questions:

1. Why is a particular component significant or what about a particular component is significant ? For example: is it due to its age, or architecture, artistic element, ecological importance, social significance, economic value *et cetera*?

It is critical to note that the level of significance may vary as one looks at a particular component within different areas of operation such as local, regional, national or international levels. All varying degrees and influence zones must be factored in.

2. Is the component related to other components (built / crafts / natural *et cetera*) for its significance or function - for example, a well or *johad* (a rainwater harvesting structure) may be significant because of its age, use, technology and construction reflective of a particular time period but the location, water table, catchment (area and character), communities (*sunghas* or dowers for locating suitable spots of ground water extraction), *mistris* or masons for construction) is equally critical to its existence and meaning.
3. Are there any rituals / practices associated with spaces of structures which directly / indirectly help to conserve, maintain and manage the resource ?

## Conclusion

We realise that no resource—built or natural—functions in isolation. In fact, it is supported and advanced by knowledge systems consisting of associated components, people, practices *et cetera*. What may otherwise be considered insignificant or ordinary, has a crucial bearing on the character, nature and quality of the even the most iconic buildings and sites. Therefore to approach and focus on individual components without their associated systems is rather counterproductive and not at all sustainable. A holistic and integrated approach towards protecting and conserving attributes, value and processes is imperative for long term solutions towards conservation, management of cultural and built resources.

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# Heritage, Tourism and Stakeholder Engagement. Do We Need More World Heritage Sites Without Local Consent?

*Kristina Svets*

Research Note

**Keywords:** public participation; tourism; locals.

World Heritage (WH) tourism can be described and defined by *location* and the tourism activities framed within WH sites as well as by the *subject* and the individuals performing tourism activities. A significant everyday connection to a WH site is the one between local WH citizens and tourists. The locals play a dual role as receivers of hands-on impact from visitors and as ‘keepers’ and marketers of local area. In terms of tourism development, the goodwill of the locals is essential since residents may affect and direct the tourism course of development (Aas, Ladkin, & Fletcher, 2005; Pedersen, 2010; Tosun, 1999). Rasoolimanesh and Jafaar (2016) show that the locals in World Heritage sites tend to be likely to both ‘elevate’ the tourism area and to ‘upset’ the tourism management, planning and achieved level of tourism attraction depending on whether their local aspirations are foreseen or dismissed.

Tourism has not been at the heart of the WH Convention (1972), and the progress of the organisation’s policy development shows a progressive approach towards becoming a stakeholder involved in tourism activities. Even though UNESCO promotes WH sites as places to visit, it simultaneously claims the importance of protecting the sites (Bordeau, Gravari-Barbas, & Robinson, 2015; Nicholas, Thapa, & Ko, 2009; Su & Wall 2012).

MacCannell claimed more than 40 years ago that local communities play an essential part of the creation of an attraction (MacCannell, 1976). Authors following him identify the significance of community participation in developing World Heritage tourism (Nicholas et al., 2009; Rasoolimanesh & Jafaar, 2016; Svets, 2015). When locals are left out of World Heritage decision-making processes *vis-à-vis* tourism development, it affects future expansion of heritage sites and becomes a crucial factor for the sustainable development of local areas (Pedersen, 2002).

In my research I found the concept of public participation as essential and should be enhanced in WH designation processes. Public participation is a familiar concept; nonetheless, there is a strong belief that there is a need for a clearer definition of terminology and conceptions explaining the theories. Briefly the concept of public participation has developed during the years, from the ancient Greeks giving the ‘free man’ the right to participation and democratic rights to vote. Today the description of an ethical understanding of public participation, understood as the right to participate in matters regarding one’s own environment is founded in the Universal Declaration on Human Rights (1948), the International Covenant on Civil and Political Rights (1966) and the Declaration on the Rights of Indigenous Peoples (2007).

There is clearly an inconsistency in the use of public participation, indicating a complex situation when actors define public participation according to their own values, interests and analytical boundaries based on different institutional and historical frameworks. As the concept of public participation is seen as a global phenomenon different countries though understand the right of the ‘public’ differently, either as an individual right or rights represented by the government.

There are many successful cases of WH designation and local participation, nonetheless far too many cases of local ‘non-participation’ can be noticed. So, do we need more WH sites without local consent mainly based on what can be categorised as pseudo-participation or tokenism understood as a distraction from real participation?



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# A Sense of Place: An Existence of the Local Neighbourhoods in a Heritage City of Chiang Mai, Thailand\*<sup>1</sup>

*Pranom Tansukanun*

*Full Paper*

**Keywords:** Chiang Mai; heritage city; local neighborhood; sense of place; sustainable tourism.

## **Abstract**

Chiang Mai, the former capital of Lanna Kingdom in the North of Thailand, is in the culturally rich and diverse Southeast Asian region. The city was nominated the UNESCO World Heritage Tentative Listed in February 2015. This paper is interested in how the heritage values of this living historic city can be maintained, while simultaneously responding to new uses, especially in relation to global (mass) tourism. It argues that, in addition to the physical form and functions of the historic city, the existence of diverse local neighborhoods create a unique meaning leading to a 'sense of place' for Chiang Mai. Furthermore, this characteristic is a key to a sustainable tourism future.

The paper investigates two different neighborhoods of Chiang Mai city, both attractive for tourists; a traditional historic neighbourhood within the city wall and an extended newer neighbourhood outside the city wall. Apart from the components of a 'sense of place' by Punter (1991): activities, physical attributes and meanings, it looks to the social networks of the local residents to clarify the subtle meaning of the place to its people and shed light on the interconnectedness of the three components. It suggests that a historic neighbourhood with strong local resident social networks and the existence of the sacred realm, are important factors to maintain the spirit of a place. Further, the conservation of built heritage as part of tourism requires an understanding on the interdependencies between the heritage and the community.

## **Introduction**

Within the culturally rich and diverse Southeast Asian region counts numerous sites classified by the UNESCO in the World Heritage of Humanity. With some of the world's most famous sites like Angkor Wat in Cambodia or Ha Long Bay in Vietnam, Southeast Asia is home to thirty seven wonderful sites that stand out for their natural or cultural value (ASEANUP, 2017). However, only four of the thirty seven World Heritage Sites in Southeast Asia can be categorised as town or city. These four sites are the Town of Luang Prabang in Laos, Melaka and George Town and Historic Cities of the Straits of Malacca in Malaysia, the Hoi An Ancient Town in Vietnam and the city of Vigan in the Philippines. Noticeably, these four sites are well preserved small historic towns and the significant value is related to urban planning and/or architecture of the western world. For example, Luang Prabang - *"a town that gathers traditional Lao architecture and French colonial buildings from the 19th and 20th century in a remarkably well-preserved blend of European and Asian cultures"*, Melaka and George Town and Historic Cities of the Straits of Malacca - *"developed in the past centuries as points of exchange between Western and Eastern civilizations, the historic cities of Malacca and Georgetown are beautiful remnants of multicultural heritage on the Straits of Malacca"*, Hoi An - *"The commercial activity of the port of Hoi An made it an important trade center from the 15th to the 19th century. Local and foreign traders have left their marks with numerous buildings that make up an exceptionally well-preserved ancient town with diverse influences"*, and the Historic Town of Vigan - *"hosts many of the well preserved European-*

<sup>1</sup>The research is funded by Chiang Mai University.

*style buildings, making it an unequalled cultural jewel in Southeast Asia” (ibid). The two historic cities in the five World Heritage Sites in Thailand, Historic City of Ayutthaya and Historic Town of Sukhothai and Associated Historic Towns, listed are both dead historic cities (historical park). This paper introduces a different type of city, Chiang Mai, a living historic city and the most significant city in the northern region of Thailand.*

Chiang Mai, the former capital of Lanna Kingdom in the North of Thailand, celebrates its 721<sup>st</sup> anniversary in 2017. As a living historic city with a number of monuments and sites, the city was nominated to the UNESCO World Heritage Tentative Listed in February 2015 (unesco.org, 2017). At present, Chiang Mai is also the centre of Northern Thailand in many aspects; economic, transportation, education, health care and tourism. Within this situation, an important question is how the heritage values of this historic city can be maintained, while simultaneously responding to new uses, especially in relation to the global (mass) tourism.

This paper argues that the physical form and functions of the historic city, combined with the existence of the diverse local neighborhoods that create a ‘sense of place’ for Chiang Mai. Moreover, this characteristic is a key to a sustainable development and the future of tourism. As sustainable tourism refers to ‘tourism that respects both local people and the traveler, cultural heritage and the environment’ (unesco.org, 2017), to conserve the built heritage as part of tourism requires and understanding on the ‘interdependencies’ between the heritage and the community (Nuryanti, 1996 as cited in Zakariya et al., 2014, p. 479). In addition, visitors can benefit from the understandings of the resident’s ‘sense of place’ and respect and act in accordance with the cultural practices constructed by the local neighborhoods.

The paper investigates two different neighborhoods of Chiang Mai city, both attractive for tourists; a traditional historic neighbourhood within the city wall and a newer neighbourhood outside the city wall. It begins by outlining the concept of ‘sense of place’ then provides a brief background to and of the present characteristics of the two neighborhoods. The paper then compares both neighborhoods to consider how each copes with changes. The paper suggests that the neighbourhood within the city wall, Lam Chang Temple, with its long history and strong social cohesion could promote more fruitful face-to-face activities among the residents than the newer neighbourhood outside the city wall, Nimmanhaemin. The paper concludes with a discussion on the need for its respect by all visitors.

## **Sense of Place and Sustainable Tourism**

### **Place in the City**

‘Sense of place’ can be defined as the qualitative total phenomenon of ‘atmosphere’ and the material things that constitute meaningful ‘places’ in cities. Moreover, places, as cities, are interconnected, unfixed and pluralized of integrated phenomena or spatio-temporal events (Tansukanun & Daungthima, 2017). For cities, ‘place’ is a fundamental concept and construct that can be used to analyze neighbourhoods (Orum & Chen, 2003). In addition, a ‘sense of place’ contributes to the notion of urban quality (Montgomery, 1998, p. 96). ‘City Village’, developing sustainable living that is inclusive of the inhabitants traditional, cultural, learning, health and so on, is also one of the desired aspects for a sustainable city (UN, 2014). Thus, the understanding sense of place in the city can generate a strong platform for underpinning goals for sustainable urbanism. Further, understanding sense of place in the urban context would not be complete without a critical consideration of cities as socially constructed places both inherited and created by the residents who live there (Adams et al., 2016).

‘Place’ is a complex term that has been defined in many ways. Almost all definitions share two significant elements which are geographic entity and meaning (Massey & Jess, eds., 2002). A mere geographic entity of ‘place’ is a space, a location of somewhere, a site, locality, locale or locus. However, a geographic entity does not create a ‘place’, but rather it is the meaning that differentiates a geographic location from a ‘place’ (Amdur & Pliouchtch, 2009, p. 148).

In summary, ‘place’ concerns the identity of a locale arising from the space defining elements as well as events, flows of people and goods and meaning. Place is also socially constructed and unfixed (Schulz, 1980,

p. 5; Relph, 1976, pp. 2-4; Massey, 2005, p. 131; Massey & Jess, eds., 2000, pp. 61-62, 88; Giddens, 1995). Thus, place and sense of place are important and contribute to sustainable urban living.

### Defining Place

'Place' can be defined based on three main factors: (1) physical features and appearances; (2) observable activities and functions; and (3) user factors of memory, image, meanings and symbols (see, for example Schulz, 1980; Garnham, 1985; Relph, 1976; Canter, 1977; Punter, 1991).

Physical features and appearances include built forms, townscape, landscape as well as furniture, locations and the relations between these components (see Figure 1). Physical feature is viewed as a tool to make distinction between 'places' (i.e. Relph, 1976), as well as the expression of selves and group identity (Rapoport, 1990, p. 15). It is of the essence for many scholars, especially urban designers (see for example Bacon, 1978; Cullen, 1995; Kostof, 1999; Day, 1990).

Observable activities and functions refer to interactions between people and the place and how cultural institutions in the society react to the place as well as how people use it create a different sense of each place. These activities and functions include land uses, pedestrian flows, behaviour patterns, noises and smells, as well as vehicle flows (Punter, 1991; see Figure 1). As 'place' can be seen as 'meeting place', a locus of activities and social relations of specific groups of people, thus, observable activities and functions is a part of the spatio-temporal social reproduction that creates a 'place'.

Memory, image, meanings and symbols is an abstract conception or intangible attributes that contribute to creating place. These elements result from the intentions and experience of human. Place created through memory and meaning is also associated with physical characteristics as well as activities and functions of the place, but with the mental process of users in interpreting and memorization. The image of a place is created from an amalgamated cognition and perception as well as the individual, group and cultural 'personality'. It is a set of feelings and impressions about that place (Spencer & Dixon, 1983 cited from Montgomery, 1998, p. 100). Meanings also change according to people activities and physical settings of the place.

The paper derives the concept of place mentioned above to find out how local residents define their 'locale' forming a sense of place and a meaningful neighbourhood representing cultural heritage and the environment that visitors should pay respect.

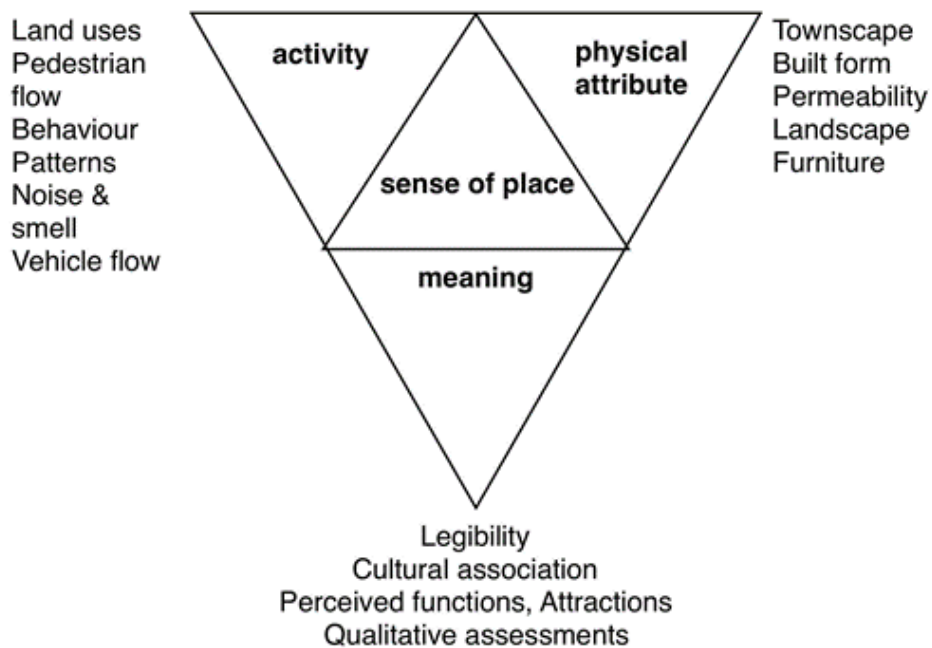


Figure 1. Components of a sense of place (source: Punter, 1991)

## Sustainable Tourism

As mentioned earlier, sustainable tourism means ‘tourism that respects both local people and the traveler, cultural heritage and the environment’. The goal of ‘sustainable tourism’ is recognised in the 2030 Agenda for Sustainable Development (UN, 2015) asking the member states to commit to “devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products”. An understanding on the interdependencies between heritage and the community is important for the conservation of built heritage as part of tourism. Visitors should also be able to experience and have a full understanding on the significance of historic place, since it can link historical values from the past. Further, the changed setting has a strong influence on the types of activities that people can do which eventually lead to the different place meanings between locals and visitors (Zakariya et al., 2014, p. 485). As a result, the local neighborhoods, sense of place and the well-being of the resident become relevant for a close investigation.

## Methodology: ‘Sense of Place’ by the Residents

In a previous study (Tansukanun & Daungthima, 2017), the above mention factors are used to identify different places as neighborhoods and districts of the historic city of Chiang Mai. It concluded that the city of Chiang Mai consists of 141 small neighborhoods constructing 14 districts, as shown in Figure 2. Further investigations in the two studied neighborhoods, the Lam Chang Temple (Figure 2 - 9.1, within the city wall) and the Nimmanhaemin (12.6 to the west of the old city wall), focus on the socio-cultural networks of the local resident groups, land-use changes, opportunities and problems as well as how well each neighbourhood is coping with the problems.

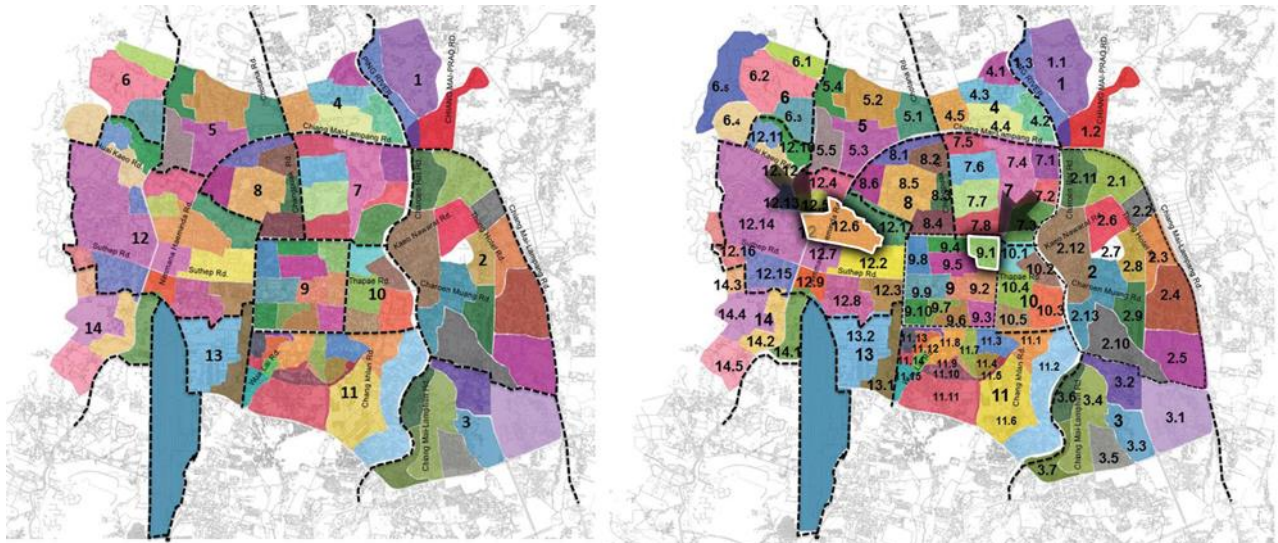


Figure 2. Chiang Mai's districts (left) and neighborhoods (right)  
(source: Tansukanun and Daungthima, 2017)

Only long term residents, residing in the area over 10 years, were interviewed. Fourteen residents from each Neighbourhood were selected randomly and by snowball technique starting from key persons. The data collection is based on semi-structured interviews to allow residents to express their feelings about their neighborhoods and sense of place without predetermined answers (Spartz & Shaw, 2011; Williams, 2008 as cited by Zakariya et al., 2015, p. 479). The interview questions about ‘sense of place’ were structured into four parts: (1) residents profiles (age, gender, occupation, length of stay in the neighbourhoods), (2) social networks (relatives, neighbors, acquaints, and the house locations of those people), (3) places of like, and dislike, or most and least visited (restaurants, shops, parks, temples, etc.) and (4) daily and ceremonial activities (what? why? where?) and what do they think are the dominant characteristics of the neighborhoods, i.e. activities, places, landmarks. The interview and record techniques were different for each

neighbourhood. For example, residents in the Lam Chang Temple Neighbourhood are mostly elderly and unable to use a map. In these instance, field notes and tape recording were used to check the accuracy of the spatial before mapping. On the contrary, the Nimmanhaemin residents are mostly elites and able to read and draw on the maps. These residents were asked to put the locations of their homes and other places directly on to the maps, with some assistance where required. The findings are examined in the next section.

## Background: The Two Neighborhoods of Chiang Mai

### The Lam Chang Temple Neighbourhood

The old square city wall, which is surrounded by moats, is perceived as the heart of the historic city (Figure 3). The area has been designated as the ‘cultural conservation’ zone in the latest Chiang Mai City Comprehensive Plan (2013-2018). Most of the significant historic elements; palaces, temples, the city pillar at the centre, historic craftsmanship zones, etc., are located within its boundaries. Thus, the old square city wall has become the strongest district of Chiang Mai in terms of the perception and image of the city (Tansukanun & Daungthima, 2012, p. 104). At present, within the area of only 2.4 square kilometres there are 38 active and 19 deserted Buddhist temples. Also situated in the area are former palaces, which are now used as museums and information centres. Further, many old wooden houses are still in place, although their numbers are reducing and changing to new uses (Figure 4). The area is one of the most visited parts of Chiang Mai for both Thai and foreign tourists.

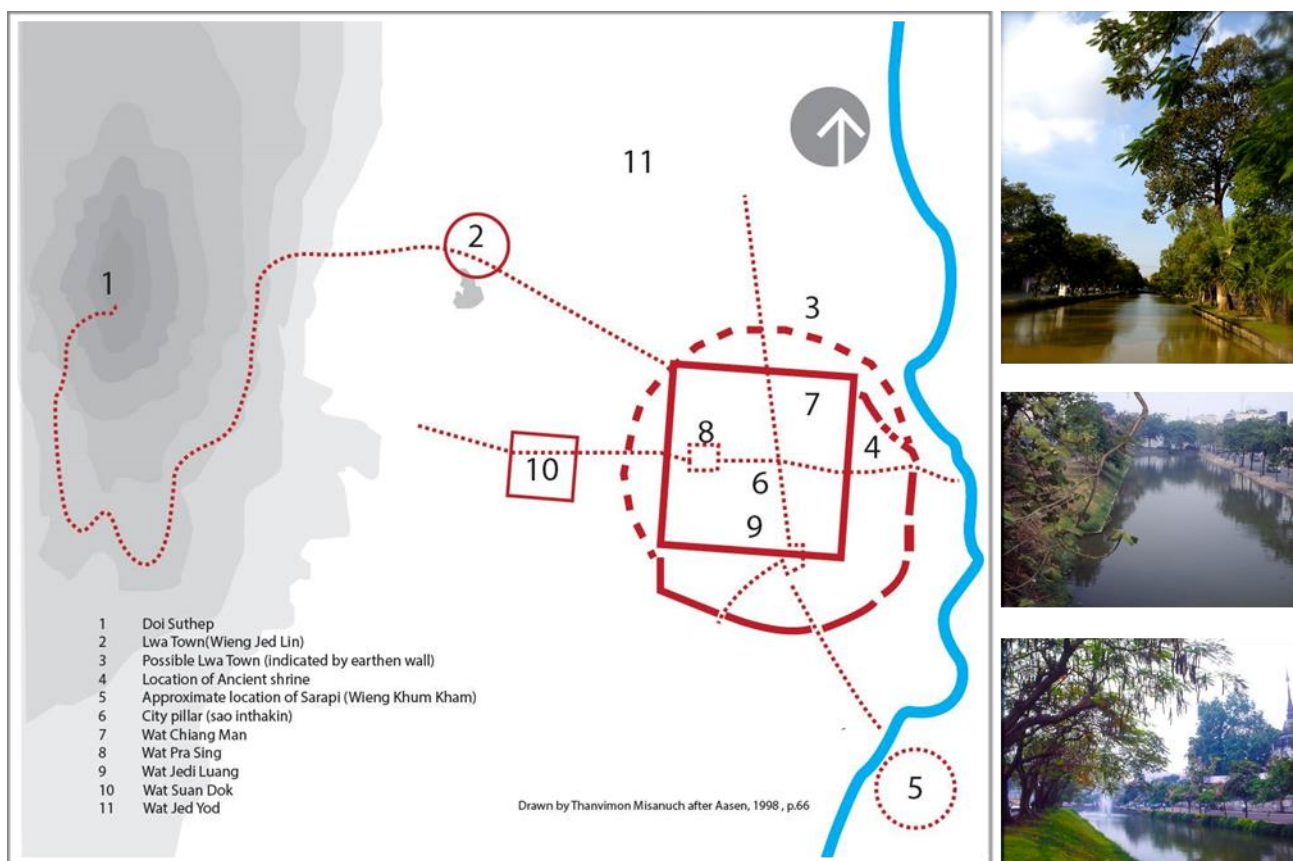


Figure 3. The Early Map of Chiang Mai (left) and images of the City Wall Area (source: Left: drawn after Aasen, 1998; Right: Tansukanun & Daungthima, 2012)

The Lam Chang Temple Neighbourhood is at the northeastern corner, an auspicious direction and the first corner built by King Mung Rai in 1296. The other significant historic elements in the area are Chiang Mun and Lam Chang, both active Buddhist temples. The Chiang Mun Temple is said to be the first temple of Chiang Mai and the site was previously where King Mung Rai resided while he oversaw the city construction. The Lam Chang Temple site was where his elephants were fed. By contrast, the Ton Poon and Chok Kaew



abandoned temples no longer function as temples, but rather have public uses as Red Cross office and a closed kindergarten school.



Figure 4. The Locations of Old Houses in the Chiang Mai City Wall Area (source: Tansukanun, 2015, p. 599)

The two neighboring markets, Somphet and Ming Muang, were once popular, but after 1996 they gradually lost their levels of use and Somphet Market was closed a few years afterwards. Nowadays only a half of the former Ming Muang Market area is used. However, the size suits the need of the neighbourhood and new function as raw material sources for the Thai cooking classes offered to foreigners in its vicinity. Ming Muang Market is the only wooden structure market left within Chiang Mai city (Tansukanun and Duangthima, 2012, pp. 105-110). As the old city wall has been the centre of interests for tourists, the Lam Chang Temple Neighbourhood has gradually changed its use to serve tourists; hotels, guest houses, restaurants, cafés, pubs and bars. The major physical appearance of the area is dominated by story modern town houses along the main roads, with 50-60 years old wooden houses and modern brick and mortar houses in other areas (Figure 5).



Figure 5. The Lam Chang Temple Neighbourhood Characteristics (source: author)

However, the additional and replacement process is going on and has started to create problems of uneven frontage lines. By contrast, the height and colour are not the major problems of the area since controls on those aspects are applied. The more detail area investigations will be in the next section.

### The Nimmanhaemin Neighborhood

The Nimmanhaemin Neighbourhood borders the Nimmanhaemin Road, built to connect the first Super Highway to the west of the old city during the late 1960's. Originally, the foothill of Suthep Mountain to the west of the old city retained sacred forests, and later was converted into agriculture land and rice paddy fields. After Chiang Mai University was established in 1964, the area flourished and the land was divided to be sold. During this time, Nimmanhaemin was occupied by Chiang Mai's elites; doctors and health care personnel, university professors, entrepreneurs and so on. It was one of the most expensive residential areas of the city. With its charming characteristic and good accessibility, Nimmanhaemin Neighbourhood started to attract designers' shops, art galleries and restaurants in the gardens. The area is one of mixed use, with all special design shops, near workplaces including Chiang Mai University, Maharaja Nakorn Chiang Mai Hospital, Ratchamungkol University as well as the Art and Cultural Centre and Chiang Mai University Conference Hall. One of the most significant temples of Chiang Mai, Suang Dok Temple built by King Kuna - the 6<sup>th</sup> King of the Muang Rai Dynasty, and Ton Payom Market are also in its vicinity.

Population growth accelerated following the construction of the Super Highway underpass connecting all visitors by vehicles from the South direct to Nimmanhaemin Road. Nimmanhaemin has become the new 'gateway of Chiang Mai' rather than the San Pa Koi District, next to the train station to the east of the city, as in the past. Together with a weak building control system, the area has become filled with high rises. Many special and designer shops have been replaced with world brand shops, restaurants and bars. The area has faced a variety of problems including traffic jams, poor drainage systems, broken skylines, not sufficient facilities for pedestrians, and last but not least, noise pollution from pubs and bars during the nights. Consequently, residents started moving out of the area and the mixed use character of the area is beginning to decline (Figure 6). Further investigation will give a more insight into the Nimmanhaemin Neighbourhood.



Figure 6. The Nimmanhaemin Neighbourhood Characteristics with low rise houses and shops (left), special type retails (middle) and high rises (right) (source: author)

### Neighbourhoods and Sense of Place

As mentioned in the literature review the physical setting, use and meaning are interconnected factors creating a 'sense of place' for individuals and a collective society. In this section, we give an amalgamate finding of these factors together with the resident social networks, the neighbourhood boundaries as well as the land use changes.

### The Lam Chang Temple Neighbourhood

The resident interviews reveal that the temples still play important roles in the lives of its people. The temple precinct today is the only public space for residents, apart from other functional public spaces such as

markets. For most residents, the small community temple, Lam Chang Temple, is visited most as a place of daily worship, while the larger tourist attraction, Chiang Mun Temple, is a place for tri-annual or annual events and ceremonies. Figure 7 shows the places that the residents visited in their daily routines.

The market place is another significant place visited by for most female and some male residents. Interestingly, the name Somphet is still used for Ming Muang Market as it was previously used for both markets. Another market being visited is Chang Puak Market, to the north of the city wall, as it is bigger and offers more variety of foods. Restaurant is another place for quick meals, that is not mentioned by all residents. Noticeable, restaurants for residents are not normally the same as those used by tourists, because of prices and types of food, except for the old restaurant – on the main road to the northern part of the neighbourhood – that is also for visitors. This can be termed as *co-existence*, not overlap. It should also be noted that many activities today, for example; work, goods shoppings, hang out with friends for the young, occurred outside the neighbourhood boundaries.

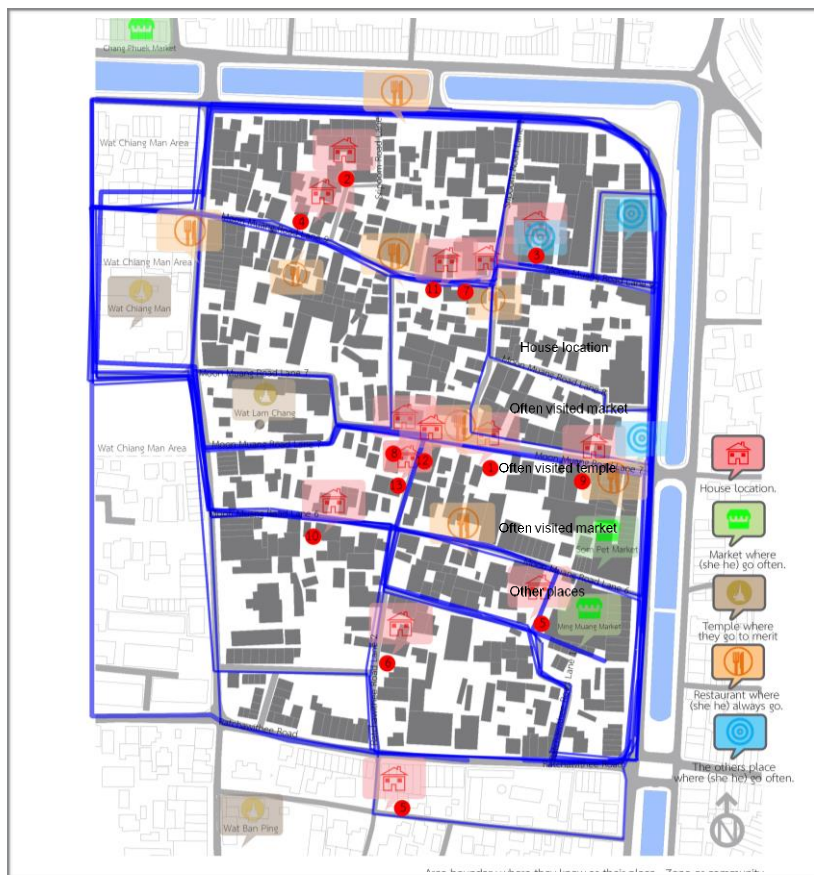


Figure 7. The Lam Chang Temple daily place of visit and neighbourhood boundaries (source: from the interviews, drawn by: Chittakorn and Jakkrit)

Figure 7 shows the locations of the interview resident houses and their neighbours, relatives and acquaintances that are named. We can see that the social relation in the neighbourhood is still very strong as residents mention at least 8-10 names and the maximum numbers go up to 25-30 names during the interviews. The social network map shows that the accustomed lines spread all over the area. However, the detailed patterns reveal that some residents confine their relations within the vicinities of the Northern or Southern parts, divided by the Moon Muang Soi 7 - the east-west road from the city moat to Lam Chang Temple. The social network map is synchronized with the local traditional lives of its people shown in Figure 8. The map shows the social sub-group system called 'Ban Kao' or the main house where performances of an ancestral respect



ritual once a year among relatives that is still in practiced. This pattern is also conformed with the land-use and land ownership maps (Figure 10 and 11) discussed below.

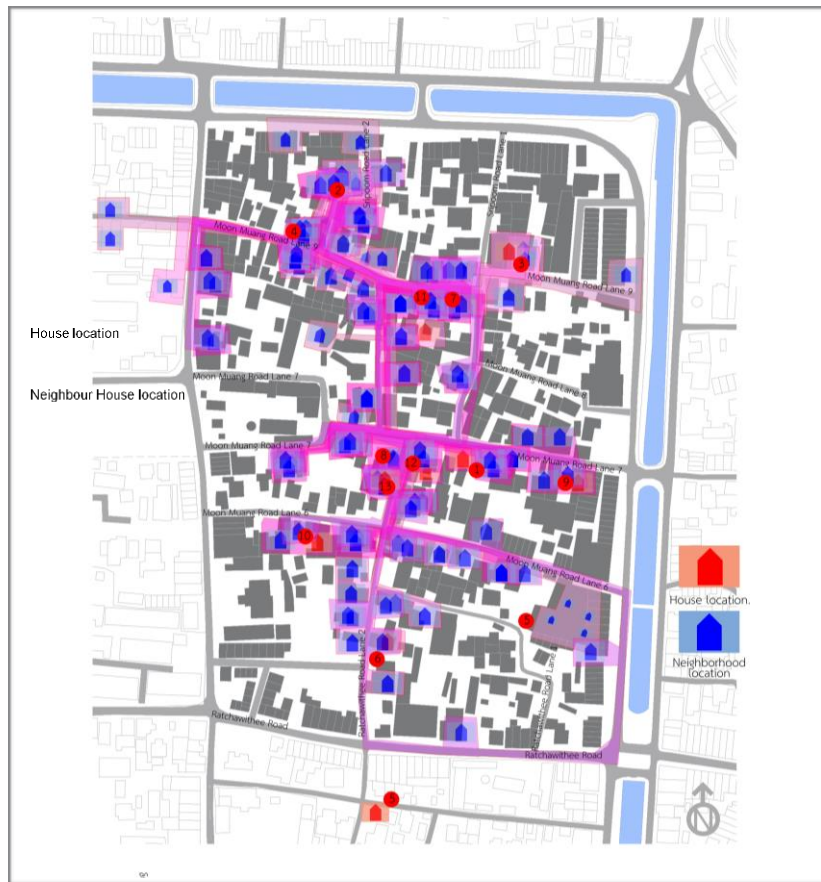
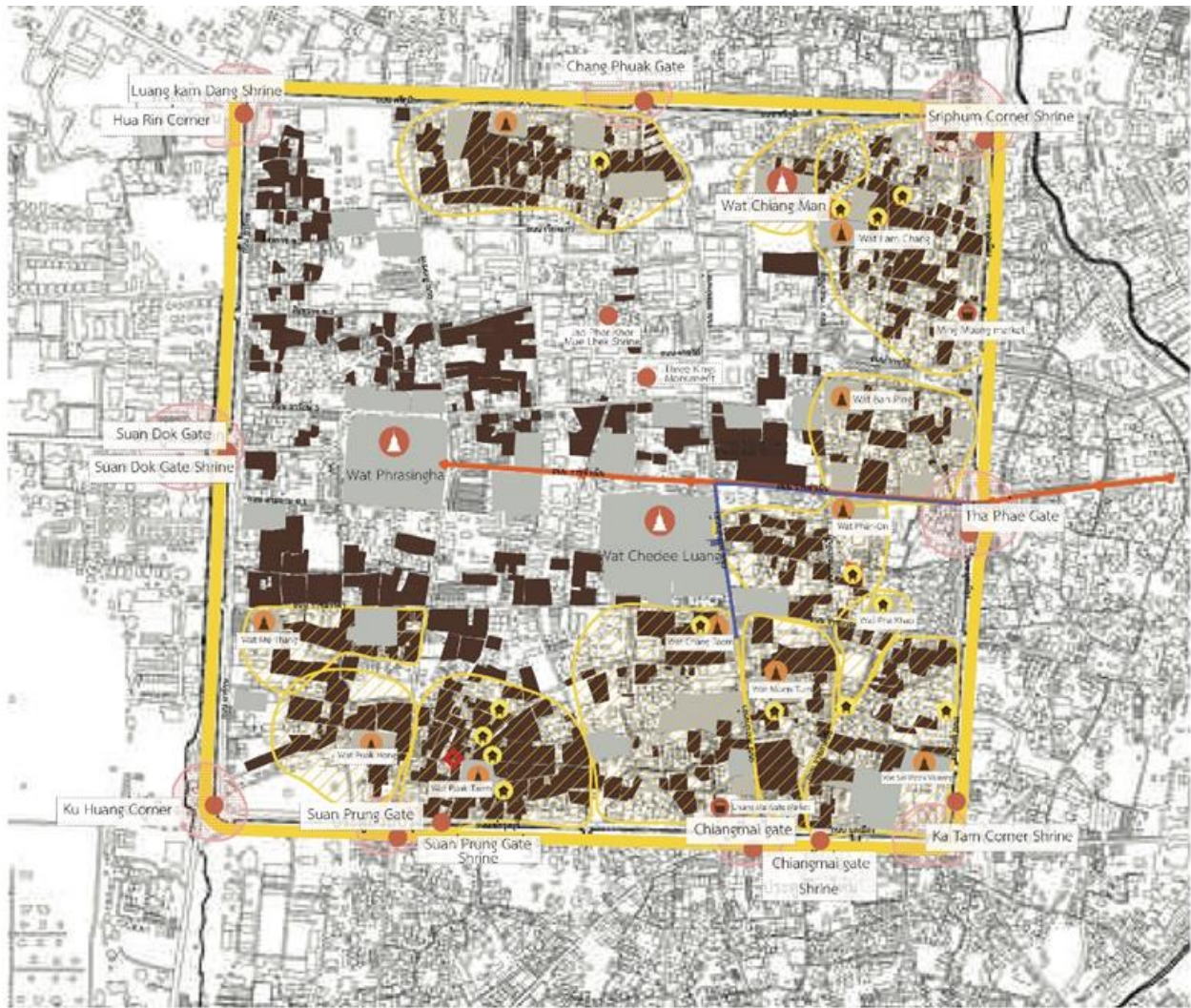


Figure 8. The Lam Chang Temple Neighbourhood social networks (source: from the interviews, drawn by: Chittakorn and Jakkrit)

From the report of Kon Jai Ban, the Chiang Mai based non-profit organization (2017), for the Chiang Mai World Heritage Initiative Project, about 42% (33%+9%) of the area of the old square city still resides the original local resident (Figure 10). The ratio in the Lam Chang Temple Neighbourhood is slightly lower as the eastern part has changed more rapidly than the western part of the old city. This should be kept in mind, as the lower number of the local resident affects the change of settings, and consequently has a strong influence on the types of activities that people can undertake, which eventually lead to the different place meanings (Zakariya et al., 2015, p. 485), by both the residents and tourists.

Interestingly, within the last five years the percentage of the land ownership in the old square city that has changed to the new comers is as high as 41% of the total area. Adding to this the land that has been rented and used by new comers, the number goes up to 54% (41%+13%) by area, as shown in Figure 11. In other words, the old square city wall is used by the new comers own/use more than half of the area within the city wall. Though the sum of the percentages of land belonging to the old residents (38%) and the land that the old residents stay with the new comers (8%) is not too low, 46% of the total area, the threat of reduced numbers of local resident is still very high since Chiang Mai is a high economic growth heritage city and the land price in the old square city is so high (Tansukanun, 2015, p. 593).



Chiang Mai City Moat local life map.



Figure 9. The Lam Chang Temple Neighbourhood Local Life Map (source: Kon Jai Ban, 2017)



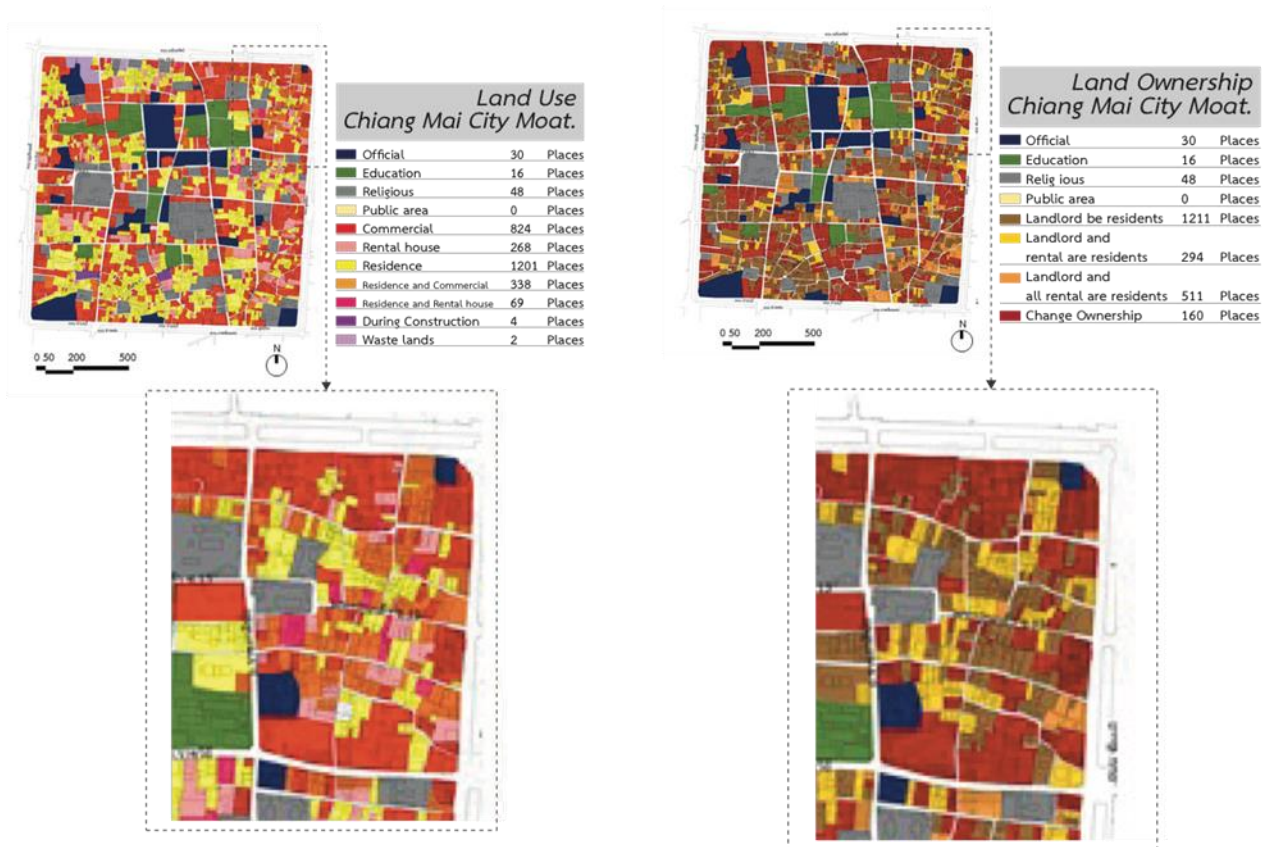


Figure 10. The Lam Chang Temple Neighbourhood Land Use Map (Left)  
 Figure 11. The Lam Chang Temple Neighbourhood Land Ownership Map (Right)  
 (source: Kon Jai Ban, 2017)

### The Nimmanhaemin Neighbourhood

The data collection for the Nimmanhaemin Neighbourhood was made through a focus group workshop with several research assistants. Residents were asked to put the location of their houses in the maps first, then their neighbours, favourite places, favourite restaurants and other places, for examples; favourite shops, a near-by park, banks, hair dresser, kindergarten school. Figure 12 shows the relevant maps.

Different from the Lam Chang Temple Neighbourhood, Nimmanhaemin residents do not associate their daily routines with the Buddhist temple, as there is no Buddhist temple within 400 metres of its boundary. Nevertheless, one of the tourist attractions, the Suan Dok Temple, is only a short distance from the Southwest of the neighbourhood and the Pra Than Porn Temple to the North of the Irrigational Road, is also near-by. Living in a comparatively new settlement, the Nimmanhaemin residents come from a diversity of beliefs and practices and go to different temples to worship. Durkheim (1984) would term this structure an *organic solidarity*, the solidarity of differences, unlike the Lam Chang Temple Neighbourhood, a *mechanical solidarity*, the solidarity of similarity.

The new type of neighbourhood not only illustrates on the social solidarity of its people, but also on its settings and the physical elements. The Nimmanhaemin Neighbourhood is comprised of many straight small roads connecting the two major roads, Nimmanhaemin and Siri-mung-kala-jarn, much different from small winding roads of the Lam Chang Temple area. Previously, the similarities between the two neighbourhoods are small road size and the green shady areas. As Nimmanhaemin develops towards a more commercial aspect, much of the greenery is replaced by many high-rise buildings. Thus, in many ways, it losses its character as a 'good mix used' area.





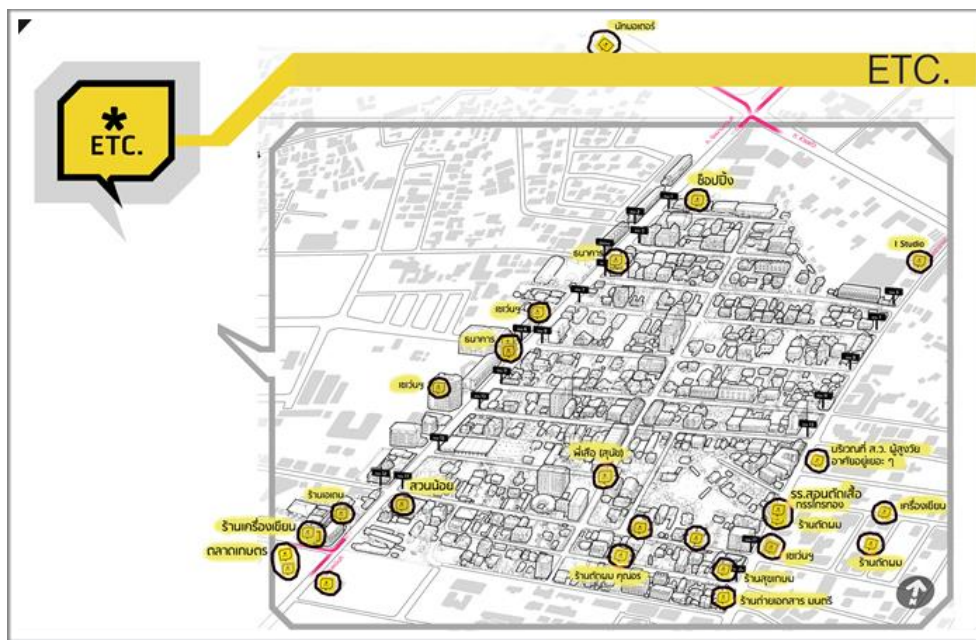


Figure 12. The Nimmanhaemin Neighbourhood Social Networks and Favourite Places Maps (source: from the focus group workshop, drawn by Pakawat Sattarujawong)

It can be seen there is a great variety in the Nimmanhaemin residents' favourite places. They are various kinds of restaurants, specialty shops, the Somdej-Ya mini park, coffee shops, healthy food shops, banks, stationeries or even a place where a dog normally lies, and so on. Nimmanhaemin Neighbourhood is a real paradise for many residents, in terms of its location and facilities within. The favourite places and other places are mostly along the two major roads, while favourite restaurants are common in the small roads between those two roads. Noticeable, many of the favourite places and restaurants for the Nimmanhaemin residents are also frequented by visitors and tourists. However, a source of conflict between the residents and visitors is the many pubs and bars in the area, since they normally produce loud noises during the nights. This has been a real burden and a push factor for the original residents to move away from the neighbourhood.

From the house and neighbours map, it seems, Nimmanhaemin residents also typically know each other a lot and have strong social networks. Nonetheless, the in-depth interviews reveal that the residents are normally individuals and get together on only important occasions, such as at community meetings. The social web and communication technologies are used to communicate among themselves. This has advantages and disadvantages at the same time.

Figure 13 shows the present (2017) and the past five years (2012) land use maps of the neighbourhood. Within these five years, the neighbourhood has reduced the low rise residential area, with increases in the numbers of apartments, condominiums and other commercial uses. At present, the low rise residential area is about 30% by area. But, in combining the low-rise residences with the apartments and condominiums as well as the mix used area, the Nimmanhaemin Neighbourhood has about 41 % by area in total for the residences. Though, the Nimmanhaemin Neighbourhood still has plenty of rooms for development from the sustainable urbanism perspective, saying that the good percentages between the loft and apartments and single houses are 52% and 48% (Farr, 2008; Wheeler & Beatley. eds., 2009), the high rise development is regrettably blocking the view to Suthep Mountain, one of the most important image elements of the city, reducing the connection from the neighbourhood and the mountain, thus, diminishing the meaning of the place.

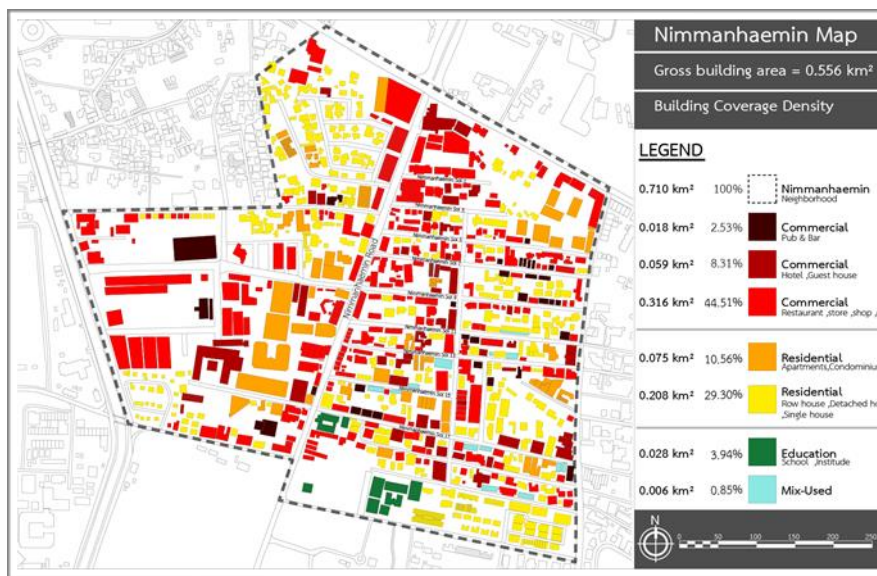
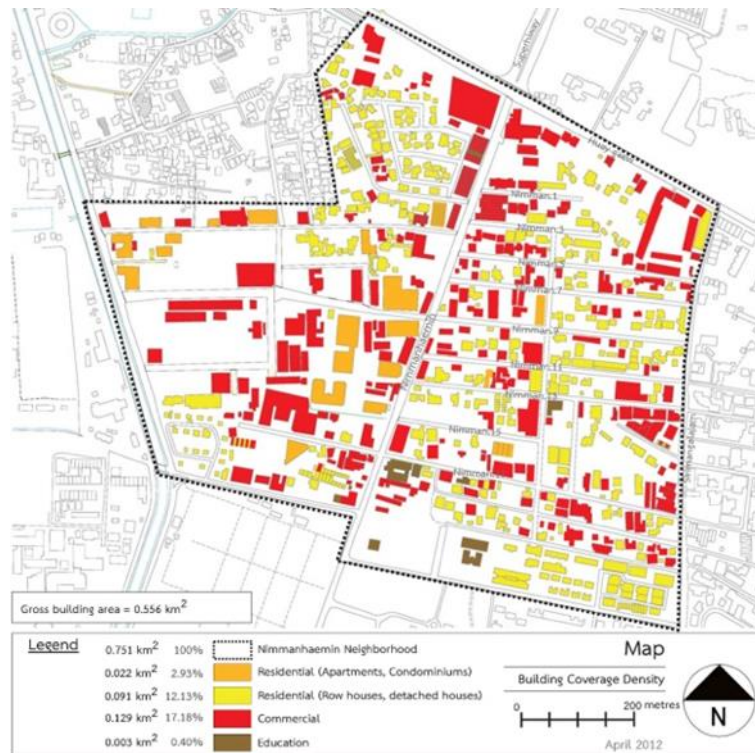


Figure 13. The Nimmanhaemin Neighbourhood Land Use Maps 2012 (upper) and 2017 (lower) (source: from the surveys, drawn by Nuttasit Srinurak and Laksanaree Wanapantaporn)

## Conclusions

### Place Boundary & Locations of Activities

The neighbourhood boundary, as *'my place'*, has a close relation to the daily routines of the residents, as found in the Lam Chang Temple Neighbourhood. However in the southwestern corner many residents' sense of place is reduced because the area is used for its pubs, bars and restaurants by tourists and most local residents do not visit the area except walking past. This is also true for the Nimmanhaemin Neighbourhood where the neighbourhood boundaries and positive sense of place are confined within the East side of the Nimmanhaemin Road because almost all shops and other facilities are on this side. Moreover, there seems not to have a *'blind spot'* within this side of the road as appears in the Lam Chang Temple Neighbourhood because of its mixed use. Thus, the locations of activity area and facilities are important in this sense.

## Space for Social Interaction

In the modern Thai context, public space has shrunk and is more difficult to locate. Luckily, the Nimmanhaemin Neighbourhood is adjacent to the Somdej-Ya mini park that can partly fulfill the needs of the local residents. Public space around the Lam Chang Temple area, by contrast, is limited to the streets and the temple grounds. Streets become important for a face-to-face and day-to-day interactions. The study by Khaisri Paksukcharern (2008) also suggests that for the Thais, small closures and alleys are used for day-to-day interactions more than large integrated streets as, for example, in Europe. Thus, streets need to be safe, walkable and shady. In the Nimmanhaemin Neighbourhood, the one-way road system is not an ideal for socialising since it brings fast traffic to the small roads, create more pollutions and is not safe for pedestrians.

## Co-existence of the Residents and Tourists

As suggest by Zakariya et al. (2015, p. 484), the backgrounds, experiences and intensity of engagement of uses influence place meaning. The local residents, who have longer and deeper engagement in places within the neighbourhood, will attach to the neighbourhood more than tourists. In addition, the identity of a place is connected to both built forms and the lives of people. Heritage cities that have no local resident, but are filled only with tourists, may not be able to represent the very distinctive character of the place since the vitality of an historic city mostly comes from the daily and ceremonial activities of the local resident, and not from tourists.

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# The Model of “Albergo Diffuso”: a Sustainable Hospitality Business in Italy

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*Full Paper*

**Keywords:** entrepreneurship; hospitality business; sustainability; destination management and governance; environmental development; competitive advantage.

## **Abstract**

The aim of the paper is to verify whether the business model of “albergo diffuso” can represent a sustainable organizational model from an economic, social and environmental perspective. The research question is: *Is the business model of albergo diffuso a valid and sustainable hospitality business alternative to traditional Italian hotels?* The qualitative research method adopted uses a *case study approach* based on two case studies of alberghi diffusi (Yin, 2009). These are analysed by focusing on the business and organizational model of the albergo diffuso. The albergo diffuso is not just a different kind of hotel with historical, cultural and artistic associations but a project to promote the history and culture of an area which can have a major impact on competitiveness, economic growth, and local social and environmental development. The paper contributes to the hospitality industry literature on the subject of the albergo diffuso, analysing it on the basis of its potential sustainability and its advantages in terms of tourist satisfaction and the subsequent competitiveness of the territory. The paper discusses two different case studies using qualitative analysis. In future research, the study will focus on a wider sample analysis, with a qualitative examination in different geographical areas. The paper studies how entrepreneurs manage this original tourism business model in Italy with a view to improving the competitiveness of Italian enterprises

**Article Classification:** Case studies

## **Introduction**

The albergo diffuso is an original innovative model of Italian hospitality. Although still limited in number, the structures are being widely developed and are becoming appreciated for their originality also at an international level (Confalonieri, 2011). An albergo diffuso is hotel accommodation situated in the centre of a small medieval town or village where there is a lively sense of community; the hotel is not in a single building, but consists of two or more separate nearby lodgings that provide guests with normal hotel services. It has to conform to the following requisites: 1) it is run directly by an individual owner as a private business; 2) hotel services and reception area are provided to all guests staying in the various ‘scattered’ lodgings; 3) rooms are decorated in a consistently authentic and local style; 4) the hotel is professionally managed in order to offer an authentic experience to the guests, and is part of a genuine community. This type of hospitality business also aims at conserving existing buildings which otherwise might end up abandoned or derelict. The rooms and reception are located in the center of an existing inhabited community, while food and drink are provided in a separate locale common to all the lodgings.

If we are to understand and control the dynamics emerging in the tourist industry, we need to analyse the problems of governance and management in the tourist destination itself. It is therefore crucial that tourist businesses are aware of and can evaluate the external environment, and provide professional and responsible answers (Baggio *et al.*, 2010). This can be a possible source of creativity for more sustainable development (Choi & Sirakaya, 2006; Jamal & Stronza, 2009; Balkytė & Tvaronavičienė, 2010; Hall, 2010;

Valeri, 2015). Therefore tourism businesses must pay attention to the needs expressed by tourists visiting their competitors' tourist destinations in order to devise consistent strategies (Nahapiet and Ghoshal, 1998).

*Therefore Is the business model of albergo diffuso a valid and sustainable hospitality business alternative to traditional Italian hotels?*

This paper is divided into three parts: the first will focus on a review of tourism sustainability literature, with particular attention paid to governance issues and the management of tourist destinations, seen as a vehicle for the creation of value and for sustainable development; the second part will present the albergo diffuso organizational model, studying its distinctive features (the number of housing units, the Italian geographical distribution, their historical and cultural character). The third part will consist of the analysis of two important Italian alberghi diffusi: *Al Vecchio Convento* and *Val di Kam*, located respectively in the Emilia Romagna Region and in Sicily, which are particularly dynamic regions from the tourist/cultural point of view.

We have chosen these two regions because 25% of all Italian hotels are to be found in Emilia-Romagna and Sicily has the largest number of tourist districts in the country (10 out of a total of 39): the districts of Catania, Palermo, Taormina and Messina, the urban areas of Agrigento, Ragusa and Siracusa, and the prospective districts of Trapani, Sciacca and the Aeolian Islands.

## The Framework

In a globalized competitive environment, tourist destinations must act in a decidedly more entrepreneurial way than ever before (Crouch & Ritchie, 2000). It is no longer sufficient to manage the relation between the tourism system and the tourists; it has become mandatory to govern the relations between all stakeholders in the tourism sector, who, in various ways, contribute to tourism (Jamal & Getz, 1995; Scott *et al.*, 2008; Baggio *et al.*, 2010). The competitiveness of a tourist destination, therefore, is dependent on the competitive capacity of each undertaking/tourist organization within it, compared to other competing tourist destinations, both national and international. This necessarily implies that each tourist destination comprises not only the individuals operating within the borders of its the territory. It is above all important to define an authority of governance, whether public or private or mixed, that is able to develop a strategic plan that upgrades not only the business but also the attractions of the area (Ritchie & Crouch, 2003; Valeri & Baiocco, 2012).

An analysis of national and international literature on the theme of sustainability is very interesting as it allows us to grasp the breadth and depth of the scientific debate on the subject. The basic problem to be solved is to understand if sustainability is more or less accepted as a philosophy based on a responsible interpretation of a complex and highly interdependent system such as the modern tourism enterprise. We need to find a systematic literature review attempting to outline the state of the art and identify certain major areas of research on which scholars have focused their interest.

As part of the international scientific debate, sustainability is a key success factor in the achievement of competitiveness of enterprises over time (Gladwin *et al.*, 1995; Godfrey & Clarke, 2000; Ryan, 2002; Liu, 2003; Dwyer *et al.*, 2009; Ruhanen *et al.*, 2010; Bramwell & Lane, 2011). Sustainable development is defined as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs". This definition of sustainability in the Brundtland Report (1987) can be applied to a wide range of economic and social conditions, whether they are emerging or developing. The definition includes three fundamental aspects of sustainable development: *economic efficiency*, *social efficiency* and *environmental efficiency* (Buckley, 2012). Sustainable tourism development tries to balance the economic returns of tourism with the conservation of the non-renewable resources consumed by the tourist industry. The impact of tourism on the natural environment in which it takes place is quite considerable in terms of the need for infrastructure and facilities which change the landscape forever, the rival use requirements of available resources, the need for goods and services and unavoidable intercultural encounters. Consequently, when an area decides to develop its tourist sector, the whole local development model is affected and the area has to make choices as to how it assigns resources, what its production goals are, and the extent to which social and business changes involving the local population are desirable.

Part of the literature on the subject of sustainability investigates the relationship between orientation to sustainability and financial results related to business development dynamics. Specifically, the literature provides conflicting views on the relationship between sustainability and financial performance. Many authors argue for the positive side of the relationship, understood as the company's ability to generate a high economic value; others claim the existence of an ideal level of sustainability, others remain neutral on the subject (Mackey et al., 2007; McWilliams & Siegel 2001; McWilliams et al., 2006; Epstein, 2008; Epstein et al., 2010). As regards the relationship between ethics and business conduct, the literature questions the possibility of an interpretation of business ethics. There are various proposals from several experts of potential models capable of introducing ethics into the activities of enterprises (Clegg et al., 2007). However, other studies on the role of Institutions argue that they have the responsibility of mediating between local conditions and the behaviour of firms (Battacharya & Sen, 2004; Neubaum & Zahra, 2006). According to this definition, any tourist phenomenon qualifies as sustainable when it manages to protect the environmental resources in the middle-long term, safeguarding the identity, values and the cultural heritage of the population (Landorf, 2009). This means that the process will not impoverish the territory and compromise the quality of the environment, nor change the social and cultural balance by generating high stranded costs for facilities and infrastructure (De Bruyn, 2003; Franch et al., 2008).

In addition, tourism is sustainable, and at the same time also responsible, when it recognizes the host communities' right to be protagonists in their territory's economic and social development (Valeri, 2016). As a multidimensional phenomenon (Jafari, 1987), tourism plays a crucial role in sustainability development (Gössling et al., 2009; Dwyer et al., 2009). The implementation of sustainability is supposed to preserve environmental resources from the uncontrolled development of tourism facilities and infrastructure, by attempting to promote the use of renewable resources, conserving energy conservation and reducing pollution (Pacheco-De-Almeida & Zemsky, 2007).

Innovative and sustainable tourism projects cannot ignore the creation of organizational environments which allow the sharing of new knowledge between enterprises and external environments. Governance and management of tourism firms have a responsibility to create an environment which is conducive to the development of new cost-effective and socially acceptable tourism services, protecting the local resources (Schianetz et al., 2007).

Therefore, when the competitiveness of tourism enterprises is measured on their ability to give unique experiences to tourists, it is the responsibility of the governance and management of these enterprises to focus on actions that will create value for tourists, with the purpose of:

- a) improving the quality of accommodation and tourism services;
- b) enhancing the quality of tourism based on intangible resources, integrating it with social, economic and environmental aspects of the territory;
- c) promoting and enhancing the local intangible cultural heritage.

This requires sustainable organizational models, indispensable for the creation of innovative tourism services, which will be able to engage and remunerate all the stakeholders. Such processes must be able to enhance and consolidate the system of relationships between the different stakeholders involved. It presupposes cooperation between tourism enterprises and tourism service providers in a co-evolution project that will require innovative processes, some clear and transparent relationships with all the parties involved and a proactive and reactive role played by tourism enterprises alongside the host communities. When a tourism firm aspires to be sustainable it should not stay isolated from its background; it should create instead a wider network with other firms and with all the stakeholders it has (Volgger & Pechlaner, 2015; Valeri, 2016).

### **The Albergo Diffuso**

The albergo diffuso is an original Italian business model. The idea of 'scattered hospitality' goes back to the 1976 earthquake in Friuli Venezia Giulia, where whole villages of Carnia were converted into tourist facilities.

*Diffuso* means that the enterprise is integrated into the socio-cultural reality of the place. The buildings that house the hotel services and accommodation, as well as their furnishings are all authentic and pre-existing (nothing new is built, only carefully restructured) (Avram & Zarrilli, 2012; Paniccia et al., 2014; Tani & Papaluca, 2015; Paniccia & Leoni, 2017). In 2016 there were 130 alberghi diffusi in Italy, classified as follows: a) 68 located in historic towns, b) 27 in historic residences, and c) 35 in old farmhouses (Alberghi Diffusi Italian Association, 2016).

The alberghi have an average number of 18 rooms and 30 beds. The highest concentration is located in Central Italy where there are 45 units. It is remarkable that Sardinia, the first to put the idea into practice, has 6 units of which 5 are historic villages transformed into alberghi diffusi.

In terms of space, alberghi diffusi are organised horizontally, since the bedrooms consist of single houses in the medieval town centre, restored and restructured in keeping with local architectural traditions.

Some hotels are spread through a historic small mountain village or hill-town; sometimes the structure of the hotel extends to cover a large part of the village, becoming an example of an authentic experience in which the village and its inhabitants, the farmers and artisans who live there become part of the experience of hospitality together with the guests. Other hotels are set up in a rural or mountain area which, while not constituting a historic village, is, however, a locality rich in local colour; still other hotels also are located in the centre of small or large cities.

From the technical and organizational point of view, a second common feature is that the bedrooms are all located within the pre-existing units. They are of different sizes, independent, and at a distance generally not more than 200/300 meters from the main building, which acts as reception and an information centre.

Unlike in traditional hotels, the restaurant is considered an ancillary service and is usually absent; however, in most of the cases analysed, we found that this activity is given special attention in some alberghi diffusi where there are annexed farms, sometimes of considerable size; the restaurant business then plays an obvious role in the socio-cultural as well as the economic sphere. Similarly, the information service to tourists is often supplied by small libraries, mini-museums, lessons on local cuisine, etc. These services are very different from the more traditional management activities of standard hotels (reception, information, accommodation, catering). During periods of increased tourist influx, some alberghi diffusi offer rented accommodation in houses owned or rented by residents, in addition to the homes owned by the hotel. The different historical, cultural and architectural features of the lodgings that make up the hotels we studied (old houses in a historical village, farms, detached agricultural buildings) and their equally varied dissemination in the area are very important distinctive elements, not only compared to other traditional formulas but also within the hotel segment of the alberghi diffusi business.

### **The Research Methodology**

The work follows the qualitative methodology of the multiple case study research of Yin (2009). This article discusses the results of a comprehensive empirical survey on two alberghi diffusi, located in Emilia Romagna and in Sicily, very dynamic regions, where entrepreneurial success is possible for young companies who care about sustainability. The study was carried out in several distinct stages:

- a) analysis of academic studies, congress papers and other articles, including non-specialist material;
- b) analysis of web sites and institution databases, trade associations and coordination structures;
- c) analysis of interviews with the General Manager of Italian Association Hotels. The questions were posed to help understand the evolutionary dynamics of the needs of tourists;
- d) analysis of interviews with the entrepreneurs of two alberghi diffusi. These are small businesses located in small local territories, and are analysed from a cultural and organizational viewpoint. Because of their special characteristics, these hotels can be considered as micro-territorial contexts within the Italian regions;
- e) analysis of the entrepreneurial and organizational model of the albergo diffuso.

Data collection is based on direct interviews with entrepreneurs of alberghi diffusi', through a semi-structured questionnaire. The questionnaire depends on the character of the person interviewed. The interviewer's attention focuses on both verbal and non-verbal communication. This is because the effectiveness of an answer does not only depend on its literal meaning as it is said but also on the way the message is perceived, caused by the influence of non-verbal communication factors. The semi-structured interviews conducted were based on broad categories that have already been investigated to show the differences between the two alberghi diffusi, relating to the business sphere, the environmental sphere, the organizational sphere and the process sphere. In this research the same determinants are investigated by analysing the following main points: 1) the geographical location, 2) the number of housing units, 3) the historical - cultural identity and architecture of the housing units in each albergo diffuso, 4) the organizational aspects and style of leadership, 5) the initial motivation of the business.

The questionnaire was administered during the month of February 2016. The analytical aspects treated are the result of the continuation of our previous research on the albergo diffuso theme. Therefore, these factors can be observed and revisited in the light of our research question: *Is the business model of albergo diffuso a valid and sustainable hospitality business alternative to traditional Italian hotels?*

## Discussion

In the paper two case studies are examined, selected from within the universe of the alberghi diffusi. They are both small businesses in territories that are different from each other. The hospitality models can be regarded as micro-businesses in territorial tourist destinations in Emilia Romagna and Sicily, both of which have major tourist flows. The alberghi diffusi under study are located in historic villages and can be considered 'young' examples of entrepreneurial success.

The survey was conducted by means of a questionnaire administered to selected alberghi diffusi owners and aimed at analysing the structural and distinctive features of every hotel studied (the geographical location, the number of housing units in each albergo, their historical – cultural identity and architecture; the organizational aspects, style of leadership, and the initial motivation behind the business). Each albergo diffuso description is accompanied by statements made by the owners during the administration of the questionnaire.

The *Al Vecchio Convento* albergo diffuso

### Q: What is an albergo diffuso?

**A:** *It is an original hospitality model of environmental tourism development. Guests are offered a life experience in the historical centre of a town or village while still being provided with all tourist services; guests are accommodated in houses and rooms that are no more than 200 metres from the centre of the hotel, where they will find the reception and other important areas. The albergo diffuso is also a sustainable model of territorial development. In fact, to build these particular hotels it is not necessary to build something new but only restore or restructure existing structures.*

The *Al Vecchio Convento* albergo diffuso is an initiative by Italian private entrepreneurs with thirty years' experience in the restaurant industry, who in 2007 decided to convert into a hotel a prestigious building dating to 1940, until then used as a restaurant. The renovation work lasted seven years and involved mainly the residents on-site and local cultural institutions interested in the requalification of the real estate. The hotel structure extends horizontally within the village for an area of 10 hectares or 10% of the total area of the village. The hotel consists of 7 units for a total of 25 rooms, which represent 61% of the total capacity of the village (41 rooms) and 0.2% of the carrying capacity of the Forlì-Cesena tourist destination (18,674 rooms) (Istat 2014). As regards the type of rooms, two consist of the main building and the annex that are owned by the entrepreneur, the other five rooms are rented by the inhabitants residing in the village. This is a good example of cooperation between the entrepreneur and the residents who are attentive to the development of the area. The services offered by the albergo are considered to be an authentic experience, in which the

inhabitants and local artisans interact with hotel guests in a series of events organized on site, such as painting classes and ceramics, along with typical local fairs and festivals.

**Q: Is the territory able to attract tourists?**

*A: It is; in fact the area attracts mostly foreign tourists, especially when it manages to blend cultural events with stunning scenery, food and wine. For example 'Chef sotto il Portico' is a festival that attracts hundreds of visitors interested in tasting many dishes from ten world-class chefs.*

The hotel's clientele is predominantly international (30 % Italian and 70 % non-Italian) and comes not only from European countries (Netherlands, England, Belgium and Germany), but also from the United States, Russia, New Zealand and Brazil. In 2014 the number of arrivals registered in the hotel was 650. During the same period, the average stay of tourists was 3 nights. The data show that the Al Vecchio Convento hotel still does not constitute a strong tourist attraction because it is newly established and because it is located near well-known tourist destinations that have high tourist flows.

**Q: What more could we do to win over tourists?**

*A: It would be useful to train operators in a practical way. It would be helpful to make a better use of the excellence of Emilia Romagna, as is the case with Parmigiano cheese and Ferrari cars. It would be useful to focus on product quality and hospitality. The rich cultural heritage and food and wine of a territory become innovations when it's possible to find a modern way to return to the traditions of the past.*

The Val di Kam albergo diffuso

**Q: What is an albergo diffuso?**

*A: Every albergo diffuso has its story and this is inevitable, because we are revitalising something that already exists. These business initiatives can help reduce the depopulation of villages, and allow them to take on a new identity.*

**Q: What is the thinking behind the establishment of an albergo diffuso compared to other Italian tourism formulas?**

*A: The guests in an albergo diffuso are interested in discovering the history, culture and traditions of a small medieval town. The tourists who decide to stay in an albergo diffuso want to experience these historical traditions. If they want a holiday where they are in contact with the natural environment, they will choose an agro-tourism or farm holiday. The two formulas are two distinct forms of tourism business.*

The Val di Kam Albergo diffuso was founded in 2002 by an Italian businessman with experience in banking and insurance. The albergo was created to save the village of Sant'Angelo Muxaro in Sicily (AG), which was being slowly abandoned for years. Sant'Angelo Muxaro has an area of 64.55 square kilometres, and is located on a hill at an altitude of 335 meters above sea level. The village has a certain importance as a prehistorical (12th century BC) archaeological site. The Val di Kam albergo exists in a kind of symbiosis with the territory.

**Q: What idea lies behind Italian alberghi diffusi?**

*A: It comes from a strong desire in small Italian villages to see their culture, traditions, food and wine take their place within a wider historical and cultural heritage.*

The hotel structure extends horizontally within the village over an area of 3,700 square meters, or 30% of the total area of the village. This albergo diffuso consists of 4 housing units, 20 rooms and 60 beds, which represent 40% of the capacity of the village (80 rooms) and 0.6% of the carrying capacity of the tourist

destination of Agrigento (3,185 rooms) (Istat, 2014). The services are provided by seven hotel workers who are all residents in the borough.

**Q: You opened this albergo diffuso eleven years ago – how are things today?**

**A:** *It's going fine, especially with foreign tourists who like to live in the small towns of the Apennines, which is an area that is still largely undiscovered. These places often lack beds and we offer visitors empty apartments located in Portico.*

The clients of Val di Kam albergo diffuso are Italians (30%) and foreigners (70%) coming from the Netherlands, Spain, France and Germany. In 2014, the number of arrivals registered at the hotel was 660 units. During the same period, the average stay of tourists was 2 nights. As regards the village of Sant'Angelo Muxaro, the Val di Kam albergo is able to attract tourist flows to the history and cultural traditions valued by the local authorities, who are always attentive to the protection of the territory.

**Results**

This paper aims to answer the following questions: *Is the business model of albergo diffuso a valid and sustainable hospitality business alternative to traditional Italian hotels?* From the analysis of the interviews conducted with the owners of the alberghi diffusi that we have chosen as case studies, and with the General Manager of the Italian Hotel Association (see below), we learnt that these two hotels were the most typical examples of the model. They have a horizontal structure made up of some existing buildings that are part of the local culture; they base their competitive advantage on a close integration with the territory and on the exploitation of local resources. In addition, they are located in buildings of cultural and historical interest, far from mass tourism destinations, preserving the local identity and the original architecture. They are particularly suited for the emerging needs of the tourism sector: by staying in these two alberghi diffusi tourists can become an active part of the host community. The interviews showed that our case studies can positively meet the requirements of sustainability.

In order to protect and enhance the local setting, historic buildings were restored in the traditional architectural style, using reclaimed building materials (*environmental efficiency*); in these hotels generous use is made of local food and wine, they promote nature, artistic and food trails, allowing tourists to actively participate in the initiatives publicised by tourism associations (*social efficiency*). At the same time, the alberghi diffusi contribute to the development of the villages they are in, boosting their products, history and traditions: after the positive experience of their stay in the villages, tourists will keep buying the typical products they found there during their vacation, bringing competitive advantage to the territorial economy (*economic efficiency*).

Nevertheless, alberghi diffusi have often failed to exploit the potential offered by the local tourist resources and the increasing numbers of socially responsible tourists. The cause of this situation may reside in:

- 1) existing regulations are inadequate to deal with a proper development of local and national tourism;
- 2) the government has a poor record of taking action in favour of efficient and effective management of tourist flows;
- 3) the government lacks the initiative to encourage the development of tourism in outlying areas.

**Q: Could the ambiguities inherent in these inadequate regulations have an effect on this form of hospitality business model?**

**A:** *The albergo diffuso is a sustainable model of Italian hospitality, which works when it tries to develop itself in small villages with the aim of improving the lifestyle and promoting the products of these areas. Over the years several legislation proposals have been criticised for their alterations to the original albergo diffuso*

model. For example, in Molise, a bill was blocked because it tried to support the recognition of alberghi diffusi as 'de-centralised' hospices for people who are no longer self-sufficient. In general, our fear is that others will take advantage of the success of this hospitality formula (GM - Italian Hotel Association).

Today, national and regional regulations simply consider alberghi diffusi as a special category, and describe their characteristics summarily, specifying minimum requirements and the conditions for issuing the necessary authorizations.

**Q: In which regions has legislation been implemented to allow the creation of alberghi diffusi? What kind of problems have emerged?**

**A:** *This happened in every Italian region, except Molise, which has a special regulation on the albergo diffuso system. In fact, there have been problems due to the fact that each region has acted independently from the others in the matter. Sometimes regulations appear to be not so perfect and it took 15 years to get 19 regulations passed (GM - Italian Association Hotels).*

Therefore, it is the decision makers' responsibility to promote actions aimed at the development the territory. They also have the responsibility to encourage the development of both local and national tourism systems, to increase the competitiveness of Italian tourist destinations. This is not easy to achieve, because it requires huge investments of human and economic resources and the involvement of the public sector, and that would be difficult for small businesses like alberghi diffusi.

**Conclusion and Limits**

This paper aims to contribute to recent studies on the topic of alberghi diffusi, and tries to suggest some ways for tourism entrepreneurs and policy makers to improve their performance. The article addresses a very recent issue, for which there is yet no official quantitative measurement; so the discussion provides an opportunity to indicate how innovation would be significant in gaining a competitive advantage in the tourism sector, starting with the improvement of the regional regulations.

The alberghi diffusi we analysed can be considered a valid and sustainable hospitality business alternative to traditional Italian hotels. Their originality lies in their structure and means of service delivery, the emphasis on authentic experiences and the involvement of all its participants. In fact, they are not merely 'scattered' hotel accommodation with historical, cultural and artistic add-ons, but a programme aimed at promoting the history and culture of an area that can have a great effect on competitiveness through the development of the local economy, as has been demonstrated by certain examples of excellence. It can also be seen from the study that the albergo diffuso model assumes a) respect for and protection of the environment, especially of the ecosystem and biodiversity - the structures and tourist activities have minimum environmental impact; b) respect for and protection of the traditional culture of the local population; c) the tourist-oriented activities are shared by the local population; d) they also share in the social and economic benefits derived from tourism.

Within historic villages, tourism cannot become a mass phenomenon. However, it can play an important role in propagating local and regional interests in a new context that relies on the small tourist business in its role of a driving force for a healthier and more sustainable development of more territories and more and more local communities. From the legal point of view, clear and consistent rules in the field of alberghi diffusi are still lacking. In regions with a higher concentration of these, there is no proper regulation. The limitation of the paper is that the analysis included only two alberghi diffusi out of the Italian total. In a future development of the paper it would be interesting to make a comparison between the alberghi diffusi in Italy and similar business models in Europe, in order to identify their specific characteristics and their potential for competitive development.

Future research will further clarify the relationships between the albergo diffuso model and the pursuit of sustainable goals by the businesses involved in developing the project. Another aspect that could be analysed in future would be how the local communities perceive the benefits offered by the alberghi diffusi; in other



words, it would be interesting to find out if the local people feel themselves part of this project for improving the value of their territory. Finally, it would also be interesting to assess the actual value created by the alberghi diffusi, for themselves and for the territory, and propose empirical models for establishing lasting partnerships between the actors of both the tourism industry and the community.

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# Are There Linkages Between ‘Sense of Place’ Attitudes of the Lake Users and Water Quality? – an Example Case of Lake Pyhäjärvi?

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*Research Note*

**Keywords:** lakes; water quality; attitudes; restoration.

## **Abstract**

Lakes serve us important ecosystem services like drinking water, fishery and recreational use, which are currently endangered by new pressures like climate change. Maintaining the environmental quality of lakes, as indicated by biological, physical and chemical variables such as turbidity, chlorophyll, and shoreline development, is also crucial to sustaining viable lake tourism opportunities. However, the relationships between such ecosystem services, environmental variables and human perceptions, attitudes, and behaviors are poorly understood.

Our research explores the linkages between lake characteristics and 'sense of place,' or the preferred meanings, satisfaction, and attachment to the physical landscape, especially water quality. The lake property owners and visitors of Lake Pyhäjärvi (SW Finland) were surveyed twice in 2001 and 2014 to obtain information about their uses of their lake, their sense of place-related meanings, their attitudes towards environmental quality, and their level of satisfaction with their lake. The first survey was part of the international project. The development of the water quality in Pyhäjärvi changed between 2001 and 2014 (eutrophication progressing and eutrophication stopped) due to large scale restoration and management measures implemented by Lake Pyhäjärvi Restoration Program. We found that the satisfaction of people was not only linked to water quality variables, but even more so to the timing of changes in water quality. If such negative change had been recent, people were dissatisfied (year 2001); if water quality remained stable for long periods then people adapted and were generally satisfied (year 2014). In 2014 people were also satisfied with the restoration measures. Peoples attachment to lake ('how important is your lake for you?') was not connected to water quality and was similar in 2001 and 2014.

As climate change and economic development continue to form new pressures on lake water quality and the recreational value of the lakes may be endangered, it is important to recognize the attitudes of local people. All actors, forces and resources are needed for comprehensive aquatic management and restoration work, which can guarantee the good quality of ecosystem services, including tourism.

## **Introduction**

People are attracted to water. Not only is water essential for life, but the peaceful image and calming sound of water relieves peoples' minds in an otherwise loud and busy commercial world. Lakes provide us valuable ecosystem services, such as drinking water, industrial water usage, fishery, recreational use and tourism. Maintaining the environmental quality of lakes, as indicated by biological, physical and chemical variables such as turbidity, chlorophyll, and shoreline development, is crucial to sustaining viable lake tourism opportunities. However, the relationship between such ecosystem services, environmental variables and human perceptions, attitudes, and behaviors is poorly understood.

Inland waters are a basic element of rural and nature tourism in Finland: most of the companies/enterprises offering tourist services are located at lakes or rivers. There are 168 000 lakes in Finland (including

waterbodies larger than 500 m<sup>2</sup>) (Statistics Finland, 2017). In Finland, shorelines are mainly privately owned with both seasonal and year-round housing, with no public access. There are some public shore areas, but their share is relatively small. Summer cottage, sauna and a boat are the most traditional elements of Finnish holiday life. Many Finns own their private holiday cottages, total number of cottages in 2016 was 502 900 cottages (Statistics Finland, 2016), either for summer or year-round use, but cottages are also hired out. Fishing and crayfish fishing tours are a continuously developing branch of the tourism industry, and other kinds of adventure tours have also become available.

In some areas of Finland lakes are threaten by the eutrophication mainly due to too high nutrient loads from agriculture, but partly also deriving from waste waters (rural areas and summer cottages are not connected to the municipal sewage system) (Heiskanen et al., 2017). This eutrophication may cause problems for summer time swimming and sauna activities. EU's Water Framework Directive sets the quality standards for European lakes and rivers, the goal is that all will be in good ecological status (European Union, 2000). National river basin plans have been made for aquatic restoration and management (Jaspers, 2003). Implementation of the plans is highly connected to activity of ecosystem users: local municipalities, companies and inhabitants.

Our research links the relationship between lake characteristics and 'sense of place,' or the preferred meanings, satisfaction, and attachment to the physical landscape. International survey was implemented in 2001 in 10 lakes districts, including 5 sites in North America and 5 sites in Europe (Stedman et al., 2007). As part of this survey, Finland provided data associated with groups of lakes in South Western Finland and the Häme Region. The survey found that in comparison with the global survey data, the Finnish 'summer, sauna and swimming' combination emphasized the importance of good water quality as the part of the personal relationship to lakes. This finding contrasts with many other countries (e.g., urban landscapes) where lakes and aquatic systems are valued more for their scenic rather than immersive qualities (Stedman et al., 2007).

### Literature review

Sense of place may be defined as the meaning and attachment to a setting (Brandenburg & Carrol, 1995), based on experience with the setting (Tuan, 1977), socially constructed meanings arising from that experience (Greider & Garkovich, 1994), and characteristics of the landscape itself (Stedman, 2003). In short, the sense of place approach allows examining the physical and social attributes of landscapes that people value.

### Research design

The large and shallow Lake Pyhäjärvi in SW Finland is an important lake for recreation and nature tourism. The water quality of Lake Pyhäjärvi impaired since 1980's, the problems like algae blooms became visible in 1990's (Ventelä et al., 2016). The intensive lake restoration program started in 1995 (Kirkkala, 2014). The deterioration stopped in 2002 and since 2003 the water quality has been stable and has remained relatively good.

In order to study the connection between water quality and sense of place attitudes (satisfaction and attachment) in two different water quality situation (eutrophication progressing and eutrophication stopped), the lake property owners and visitors were surveyed in 2001 and 2014 to obtain information about their uses of their lake, their sense of place-related meanings, their attitudes towards environmental quality, and their level of satisfaction with their lake. The number of interviewed was 70 in both time. Here we present the results of the activities ('what kinds of activities do you do in your lake'), the satisfaction ('how satisfied are you with different aspects of your lake' and 'how would you rate your lake overall') and attachment ('how important is your lake to you') parts of the survey.

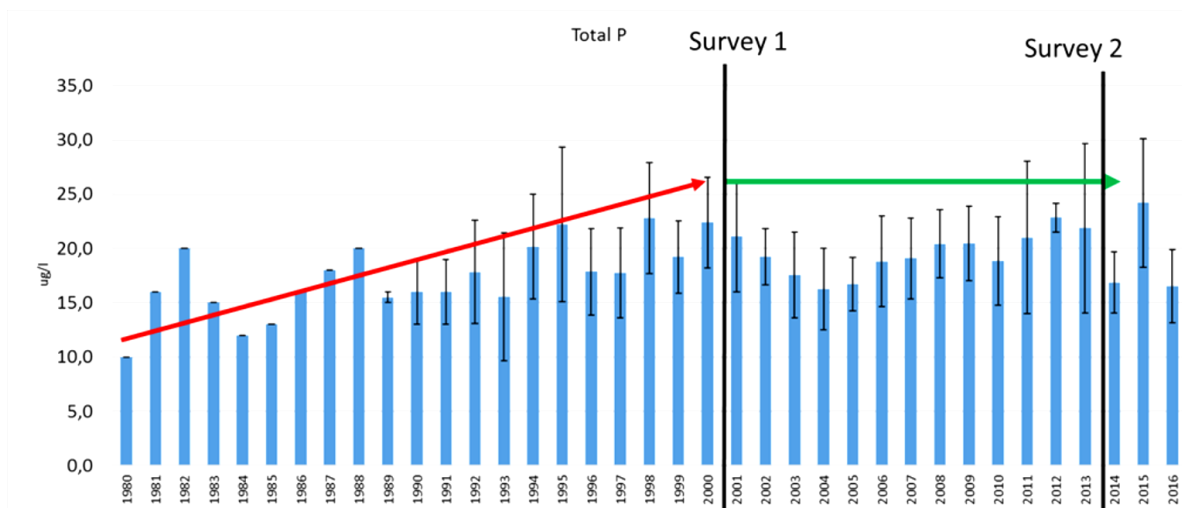


Figure 1. Total phosphorus content as indicator of water quality of Lake Pyhäjärvi in 1995-2016. Survey 1 was conducted in 2001 and survey 2 in 2014.

## Results and discussion

The most popular lake related activities were both in 2001 and 2014 swimming, relaxation and walking. People were less satisfied with the lake in 2001 than in 2014.

Table 1. Satisfaction: 'How satisfied are you with different aspects of your lake'

	2001	2014
Extremely dissatisfied	1 %	0 %
Somewhat dissatisfied	9 %	0 %
Somewhat satisfied	76 %	64 %
Extremely satisfied	14 %	36 %

Table 2. Satisfaction: 'How would you rate the water quality of your lake'

	2001	2014
Poor	4 %	0 %
Fair	54 %	20 %
Good	31 %	49 %
Very good	9 %	27 %
Excellent	1 %	4 %
Perfect	0 %	0 %

Based on the comments, we believe that this was linked to water quality. As swimming and sauna are the most important activities, the role of water quality is underlined. However, the satisfaction was not only linked to actual water quality, but even more so to the timing of changes in water quality. If such change had been recent, people were dissatisfied (2001); if water quality remained stable for long periods then people adapted and were generally satisfied (2014).

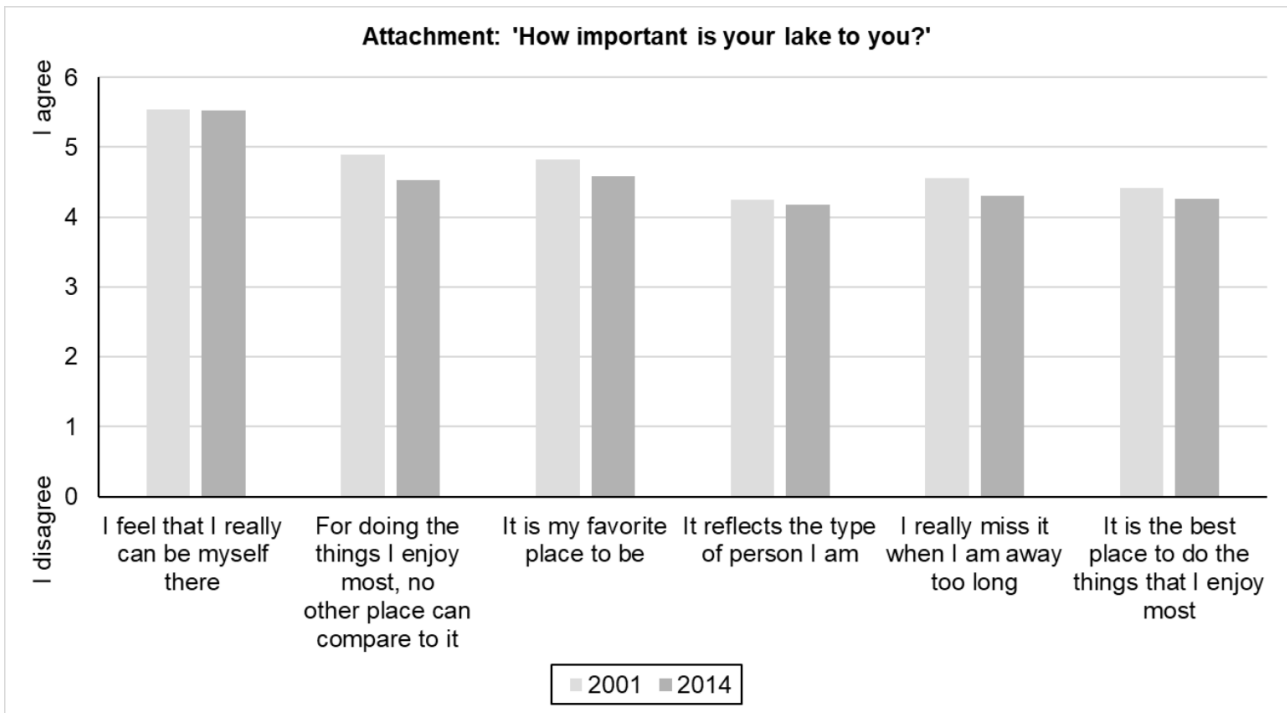


Figure 2. Attachment: 'How important is your lake to you?'

Attachment was relatively high in both surveys and it did not change between 2001 and 2014. This supports the findings of the international survey in 2001 (Stedman et al., 2007) and earlier studies (Stedman, 2003), which found that attachment was not clearly linked to water quality, but satisfaction was. Not all lake activities are connected to water quality (walking, fishing, canoeing, wild life observation) and there other components of the experiences like views, sounds and silence.

### Conclusions

As climate change and economic development continue to form new pressures on lake water quality and the recreational value of the lakes may be endangered, it is important to recognize the needs and attitudes of local people. In Pyhäjärvi, peoples satisfaction was improved as the results of restoration work became visible and the deterioration of the water quality was stopped. High attachment rate is an indicator of the willingness to participate or support the restoration work. With Finnish swimming and sauna culture the water quality of 'my lake' becomes a personal matter. In international survey (Stedman et al., 2007) we found that the Finnish respondents were very attached to their lakes, the attachment scores were the highest among the European lakes. All actors, forces and resources – including tourism – will be needed for comprehensive aquatic management and restoration work, which will guarantee the good water quality needed for all ecosystem services also in future.

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