Culture Kent, a Cultural Destinations Project, is led by Turner Contemporary in partnership with Visit Kent, funded by Arts Council England and Visit England.

Culture Kent Research - Report 1
Audit of the Cultural Tourism Landscape

MARGATE
Your sand castle won't be the only work of art.

KENT GARDEN of ENGLAND
Turner Contemporary, Margate   visitkent.co.uk
Travel Kent with **southeastern** trains

Turner Contemporary, Margate. Image courtesy of Visit Kent

Part I: EVIDENCE REVIEW

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CULTURE KENT RESEARCH PROGRAMME
REPORT 1- AUDIT OF THE CULTURAL TOURISM LANDSCAPE

THE CULTURE KENT PROJECT

Culture Kent was a three-year project led by Turner Contemporary and funded by Arts Council England and VisitEngland, as part of the *Cultural Destinations* Programme, launched 'to enable arts and cultural organisations working in partnership with destination organisations to increase their reach, engagement and resilience through working with the tourism sector'.[1]

Over the last three years, Culture Kent has aimed to:
- showcase Kent's cultural assets and **extend its reach** by attracting new audiences;
- **create new strategic relationships** between the cultural and tourism sectors in order to drive economic growth; and
- **develop the information and knowledge core** that strengthens the Kent cultural tourism offer.[2]

The achievement of these targets for Culture Kent has required research and intelligence to inform the development of the project and to provide a legacy for future work on cultural tourism in Kent to be developed. This was essential in that the *Cultural Destinations* Programme aimed to 'build partnership capacity in the cultural and visitor economy sectors' to ensure future 'commitment from public and private sector partners to continue working in partnership to support the growth of the local visitor economy… beyond the life of the project.' [3]

A two-year research programme was commissioned by Culture Kent to provide research and evidence required to help the Project to achieve its key outcomes. During the delivery of this research programme, the research team reported to and shared progress reports and findings with the Culture Kent Steering Group and a smaller Culture Kent Research Working Group. All reports have been scrutinised and discussed by the Working Group, chaired by the Culture Kent Project Director. A *Summary of Findings Report* drawing all components of the Culture Kent Research Programme together can be viewed separately (*Culture Kent Research Programme - Summary of Findings*). This report (*Report 1*), however, sets out the findings from the Audit of the Cultural Tourism Landscape, delivered:

To evaluate the existing knowledge of the cultural tourism offer (product, destination and experience) and consumer.

To provide the framework for the study and to ensure that the subsequent primary research conducted to explore organisational (*see Report 2*) and consumer (*see Report 3*) perspectives was informed by the existing knowledge of both the cultural tourism offer (product, destination and experience) and consumer, an Audit of the Cultural Tourism Landscape was conducted, via:

- a Rapid Evidence Review (Report 1: Part I); and
- an Audit of the Kent Cultural Product and Existing Methods of Data Collection (Report 1: Part II).

Part I: A rapid evidence review was required to ensure that the study could establish the wider context within which to position Culture Kent. The synthesis of culture and the arts with tourism necessitates cross-sectoral working and,

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[1] www.artscouncil.org.uk
[2] https://culturekent.net/
[3] www.artscouncil.org.uk

with that, a need to understand the emerging relationships between the two sectors, the profiles of cultural tourists and how cultural destinations can develop organically within the visitor economy.

Part II: In order to provide a baseline understanding of the current cultural tourism landscape in Kent, an audit of the Kent cultural product was completed through desk research and stakeholder engagement. At the start of the study no database existed to identify the cultural/arts/tourism organisations in Kent. An audit database was developed, to offer a more comprehensive picture of cultural tourism in the county and to act as a tool for future communication, beyond the life of the Culture Kent Project.

Following this, an audit of the existing data collection methods and techniques utilized by a sample of 30 organisations within Kent was conducted, via a SNAP survey to cover current practices, aspirations, barriers and potential for future data sharing. The 30 organisations were selected from current Audience Finder users, potential Audience Finder users as well as key tourism organisations across the county. The objective of the survey was to gather as much information as possible about how, and if, organisations collect data and the level of relevance that data plays in the development of their organisation.

Red Ladies (photo Manu Palomeque), courtesy of Turner Contemporary, Margate.

CULTURE KENT RESEARCH PROGRAMME

REPORT 1- AUDIT OF THE CULTURAL TOURISM LANDSCAPE

PART I: EVIDENCE REVIEW

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2 CONTEXT

To provide the framework for the Culture Kent Research Programme and to ensure that the subsequent primary research conducted to explore organisational (*see Report 2*) and consumer (*see Report 3*) perspectives was informed by the existing knowledge of both the cultural tourism offer (product, destination and experience) and consumer, an Audit of the Cultural Tourism Landscape was conducted. This report (*Report 1: Part I*), sets out the findings from the Rapid Evidence Review, delivered:

To evaluate the existing knowledge of the cultural tourism offer (product, destination and experience) and consumer.

The synthesis of culture and the arts with tourism necessitates cross-sectoral working and, with that, a need to understand the emerging relationships between the two sectors, the profiles of cultural tourists, and organisational perspectives on partnership working within the context of cultural destinations.

3 RAPID EVIDENCE REVIEW - METHODOLOGY

Following initial meetings with Culture Kent a clear set of themes and review questions was identified to inform the initial search and identification of sources. The **thematic framework** (section 3.1) provided the basis for the review of sources related to the nature of the cultural destination, the cultural tourism 'offer' and profiles of cultural tourists.

 A clear search protocol was established and agreed at the first working group meeting to ensure that, not only were appropriate guidelines followed in terms of best practice in evidence reviewing, but that Culture Kent had an opportunity to help identify further issues or research gaps that could inform the review. A range of data and evidence has been included in the review to ensure that the study could benefit from:

- the academic literature on the cultural tourism landscape, offer and consumer;
- sector specific reports from organisations such as Arts Council England, VisitEngland, and various tourism, arts and cultural bodies;
- key policy documents; and
- research and evaluation studies.

The following review has been structured both to answer the review questions (*thematic framework*) and to provide a framework for the subsequent primary research to explore organisational and consumer perspectives, related to cross-sectoral working and cultural tourism. Key findings from the review were fed into subsequent stages of the research.   The Evidence Review focuses mainly on industry and policy trends from 2010 onwards, with allowance for earlier studies which offered significant insights on structural/theoretical perspectives. The review ended with the publication of the October 2016 Turner Contemporary Report on *Art Inspiring Change: Turner Contemporary Social Value Report (Jackson et al, 2016).*

3.1   THEMATIC FRAMEWORK

This thematic framework, developed in consultation with the Culture Kent project team and the Research Working Group, has enabled the Evidence Review to be focused on the following questions:

1. What current trends are influencing the contemporary cultural tourism landscape?
2. How can the cultural tourism offer be defined in terms of the product, destination and experience?
3. How can cultural tourists be profiled, with specific reference to their motivations, decision making and behaviour?
4. What are the opportunities and barriers to cross-sectoral working between tourism and culture from an organisational perspective?

Sections 4-7 below will set out the detailed findings of the full Evidence Review.

Urban Playground, bOing! Festival (photo Manu Palomeque), courtesy of Gulbenkian

4 CONTEMPORARY CULTURAL TOURISM LANDSCAPE

4.1 INTRODUCTION

The past 10 years have witnessed economic austerity and restructuring. Within this period, tourism and the cultural sector have become increasingly prominent, both as objects of policy in their own right, and also as instruments of policy to attain the wider social and economic goals of local and national governments and the European Union. In Britain, the relatively robust nature of tourist demand, the economic promise of both tourism and the cultural and creative industries, the dominant SME and micro enterprise structure of both sectors, as well as the highly *place* specific characteristics of both sets of activities, marked out tourism and culture as vehicles to deliver the goals of economic recovery, local regeneration, and the Big Society agenda of the early days of the Coalition Government. More recently, the publication of the DCMS's (2016c) *Culture White Paper* reinforces this view that 'culture has the potential to transform communities' (:9). Furthermore, the place agenda reflected in the *White Paper* takes this argument forward to establish 'culture at the heart of place-making' (:29).

4.2 ARTS, CULTURE AND THE CREATIVE INDUSTRIES

4.2.1 Evolution of 'cultural sector/creative industries' concept

Since the latter decades of the 20th century, commercial media industries such as film, TV and recorded music have been included in the policy discourse of culture, a trend which has accompanied the weakening of the principal of public subsidies for the arts and the push to secure more commercial and consumer-oriented sources of income. The EU definition of the cultural and creative industries (*see Table 1 below*) informs the European Cultural Agenda[4] and a raft of EU programmes which seek to use culture as a 'vector for development', both economically, and as a means of strengthening civil society, within Europe and in its relations with external partners.[5]

Table 1 EU definitions of cultural and creative industries

Core arts	Cultural industries	Creative industries	Related industries
Visual arts, performing arts, heritage	Film and video, TV and radio, video games, music, books and press	Advertising, architecture, design	PC and MP3 players manufacturers, mobile industry

(Source: Smith 2003)

In England, the 'cultural and creative' sector emerges as a fluid concept formed largely in the context of different institutional arrangements and policy debates surrounding the value and funding of the sector. The DCMS 1998 classification of activities making up the culture and creative industries sector was revised in 2014 in the light of research by Nesta highlighting methodological inadequacies in the classification of activities. The new classification takes account of changes in the 'economic reality' of the sector, in particular the impact of digitization and 'the fact that increasing numbers of industries are embracing creativity as a way of gaining competitive advantage' (Bakhshi *et al.* 2013:6). The new classification, which introduces the concept of the 'creative intensity' of an industry, is employed in the DCMS Creative Industries Economic Estimates for 2014 (Department of Culture, Media and Sport,

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2014), and by the Warwick Commission Report on the *Future of Cultural Value* (2015). This takes a more holistic approach than that of the EU's classification, and argues the need to support and facilitate the dynamic flow between the different elements of the Cultural and Creative Industries Ecosystem: 'the sum is greater than the parts, and each part makes its contribution to the whole' (ibid p.3).

Table 2: Classification of the Cultural and Creative Industries Ecosystem (Warwick Commission Report)

THE CULTURAL & CREATIVE INDUSTRIES ECOSYSTEM	
Music, performing & visual arts	Design: product, graphic & fashion design
Museums, galleries & libraries	Film, TV, video, radio & photography
Publishing	IT, software & computer services
Architecture	Advertising & marketing
Crafts	

(*Source: Warwick Commission, 2015*)

The **Arts and Humanities Research Council's Cultural Value Project** on the other hand, adopts an even broader remit in encompassing not only publicly-funded, third and commercial sector activities, but also 'the informal and improvisatory practice and experience of culture'.[6] This, as shall be seen subsequently, fits well with the broader understanding of culture as a form of authentic or interactive experience, coming out of the growth of the 'experience economy', and, in particular, tourism. The collapsing of category distinctions in the cultural and creative industries is mirrored in the reconfigured portfolio of Arts Council England, whose remit has been expanded to include responsibility for museum and library development, as well as statutory responsibilities for protecting cultural treasures (Arts Council England, 2014b).

The evolving definition of the cultural and creative sector has implications for the ways in which value is both measured and created, with respect in particular to the **renegotiation of the relationship between public and private sectors**, and the growing emphasis on the **importance of networks** as part of the practice of cultural organisations.

4.2.2   Measuring and creating value

The value of the national government grant to Arts Council England, the main body responsible for investing public money in support of culture and the arts, saw a 36% decline between 2010-2015 (Arts Council England, 2015). Local authorities have continued to invest in arts, culture and libraries, even in times of austerity, to the tune of £1.6 billion, but have also suffered substantial cuts in central government funding, resulting in a reduction of 19% in local authority arts and libraries budgets over the past three years (Warwick Commission, 2015). Yet, as the Warwick Commission Report points out, 'it is also important to note that Local Authorities are being driven by the balance sheet rather than hardening attitudes to the value of arts and culture' (:67).

In a context of falling public subsidy, demonstrating value has become an increasingly important priority within a mixed public, private and commercial funding environment. In May 2013, the Centre for Business and Economic Research published a report commissioned by ACE and the National Museums' Directors Council on *The Contribution of the Arts and Culture to the National Economy*. The report gave a macro-level analysis of the sector as a business economy, and identified 'spillover impacts' in terms of the contribution of arts and culture to tourism, economic regeneration, and national productivity. The report noted:

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[6] http://www.ahrc.ac.uk/newsevents/news/economicvaluereport/

> … the greatest contributor to the overall funding of the industry (that is, including public funding and third-party charitable donations) has been and still is *earned income* [emphasis added]. In other words, it might be said that arts and culture is experiencing a pincer movement effect in the aftermath of the financial crisis, reduced consumer expenditure due to squeezed incomes and reduced public funding (CEBR, 2013:3).

Although the CEBR report highlights the reduction in consumer expenditure, the picture with regard to spending on arts and culture is mixed. Attending music concerts, for example, was one of the most popular activities in Great Britain in the year ending September 2014, and spending on live music performance is expected to rise in value by 16.2% between 2015 and 2019, driving a rise in the growth of the sector overall, including recorded music and musical instrument production, from £2.51bn to £2.75bn (Keynote, 2015b). With 30.7% of the 2015/2016 respondents to the *Taking Part Survey* stating they had attended a live music event, this continues to be the most popular art form attended and the longitudinal data from 2005/06 reflects a 24.4% increase over this time period. Interestingly, '*other' live dance events* and *contemporary dance* were the two other art forms which had seen an increase in the period since 2005/06, but with a much smaller proportion of respondents (DCMS, 2016a :6). It must be noted, however, that the impact of this growth predominantly affects Greater London, with its concentration of larger stadia and arena attracting big names, and contrasts with the closure of many smaller music venues up and down the country, leading to the formation of the Music Venues Alliance in January 2015 in an attempt to address this decline (Keynote, 2015b).

The buoyancy of the museum sector owes much to tourism, both domestic and inbound. Museums are amongst the most popular type of tourist attraction in the UK by volume of visitors, although these are mostly accounted for by major flagship museums such as the British Museum and Natural History Museum. Figures from the 2015/2016 *Taking Part Survey* (DCMS, 2016b) highlighted that 52.5% of adults had visited a museum or gallery in the last year, representing a substantial increase from 42.3% in 2005/06 (:3). The *Museum Activities Keynote Report* (Keynote, 2015a) expects that the anticipated continued rise in numbers of inbound tourists and expenditure by foreign tourists will continue to benefit the museum sector. The picture with regard to visitation of smaller museums, especially outside of the London area, is unclear.

Overall, tourism makes an important contribution to the income of UK arts and cultural and creative industries, just as the arts, culture, heritage, and creative industries, are acknowledged to be a major feature of Britain's image and tourist appeal, adding value to the British tourism product overall. The relationship between tourism and the sector is discussed in more detail below.

In addition to the market value represented by consumer expenditure, a number of reports have argued the case for recognising the **intangible value** to consumers of engagement with arts and culture. Research by the Happy Museums Project[7] and University College London Museum Wellbeing Measures[8] has demonstrated the impact of museum visitation on happiness and relaxation, and developed a toolkit for museums to incorporate the measurement of wellbeing impacts into their monitoring and evaluation.[9] The 2014 DCMS report *Quantifying and Evaluating the Well-being Impacts of Sport and Culture* developed economic measures for placing a value on the benefits of engaging with culture and the arts, which estimated the wellbeing value to individuals of arts engagement at £1,084 per person per year, whilst the wellbeing value associated with frequent library use was estimated at £1,359 per year (Fujiwara *et al*, 2014). Most recently, the Turner Contemporary *Social Value Report – Art Inspiring Change* (2016) set out to measure the 'social value created by Turner Contemporary using a methodology based upon Social Return on Investment (SROI) principles. In addition to the use of the SROI to quantify impact and return on investment, it highlights for example, many outcomes for visitors to the gallery such as:

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[7] http://www.happymuseumproject.org
[8] https://www.ucl.ac.uk/museums/research/touch/museumwellbeingmeasures/wellbeing-measures
[9] https://www.ucl.ac.uk/museums/research/touch/museumwellbeingmeasures/wellbeing-measures/UCL_Museum_Wellbeing_Measures_Toolkit_Sept2013.pdf

- 'the chance to experience new and different understandings of the world';
- 'an increase in knowledge of art'; and
- a 'stronger feeling of connectedness to friends and family' (Jackson *et al*, 2016:7).

Such outcomes resonate with the wider body of research emphasising the non-monetary benefits of engagement with art/culture. This is addressed below with regard to the wellbeing agenda and education and skills.

In 2012 ACE launched its *Catalyst Arts* Programme, with the aim of encouraging the diversification of income sources by building the capacity of arts organisations to fundraise, incentivise giving by private donors, and help organisations identify and overcome barriers to fundraising, thus effecting a long-term culture change. The evaluation of Year 1 of the programme found that new fundraising knowledge had been brought into arts organisations, and that 85% of the 173 arts organisations in the programme had piloted ways of fundraising new to them. These included new membership schemes, crowd funding, and customer relationship management systems (Arts Council England, 2015a). Building **resilience** into arts and cultural organisations is a key strategic target of the *ACE Corporate Plan 2015-2018*. It emphasises the need for business planning, minimisation of financial risks, income diversification, strategic partnerships, fundraising, and the promotion of diversity, to bring on new talent and build new audiences. As John Kampfner has argued, 'There is a burning need … for the private sector to be more civic, for the public sector to be more entrepreneurial', despite the potentially clashing business models of commercial creative companies and publicly funded arts organisations (Gold *et al*, 2014). The formation of the Creative Industries Federation in 2013 represented a move in this direction, by creating an advocacy and research organisation 'bringing together commercial companies and publicly funded cultural organisations, think tanks and education bodies, large and small, across the whole country'.[10]

Beyond economic value: Apart from the focus on organisational resilience and financial robustness, the current ACE strategic framework and the Warwick Commission 'blueprint for growth' lays considerable emphasis on the non-monetary benefits of a thriving cultural and creative sector to the individual and society in general (Arts Council England 2014b, Art Council England 2015, Arts Council England 2014a, Warwick Commission, 2015) . These include:

***Diversity*:** The Warwick Commission (2015) Report notes that

> … audiences, consumers, and the creative workforce … publicly funded arts, culture and heritage, supported by tax and lottery revenues, are predominantly accessed by an unnecessarily narrow social economic, ethnic and educated demographic that is not fully representative of the UK's population' (:32).

Broadening diversity and access is regarded as crucial not only for tapping into talent, but also for securing the resilience of the sector by developing future audiences.

***Local engagement*:** The cultural and creative sectors are acknowledged to have a leading role to play in the regeneration and creation of flourishing towns and cities. The Warwick Commission (2015) Report notes the success of creative clusters in places such as Birmingham, Sheffield, Brighton and East London, and the adoption of the creative industries as a priority sector by 25% of Local Enterprise Partnerships, but argues that 'the role of cultural organisations as strategic partners in the more fundamental place-shaping role, building and moulding local communities and identities, remains underdeveloped' (2015:66). The economic, cultural and social strategies comprising place-shaping often lack distinctiveness, and even disregard local cultural expression and heritage entirely. Nevertheless, the effectiveness of culture-led regeneration has been found to be greater the more place-specific and locally anchored the cultural activity (CEBR, 2015). The *ACE Corporate Plan 2015-2018* envisages deploying an increased proportion of investment outside London, but stresses the necessity of not compromising quality by damaging the London or national ecology. Whilst maintaining quality and excellence remain priorities,

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[10] Founder members included Kent County Council the Kent Messenger Group, Turner Contemporary, and Sir Roger De Haan. See http://www.creativeindustriesfederation.com

the requirement to tap into local communities and sense of place is also seen as fundamental. In the words of the Warwick Commission Report, 'the national has to be local too' (2015:69).

Wellbeing agenda: Over the past decade, subjective wellbeing (SWB) has been increasingly recognised as an important measure of social progress used by organisations such the OECD, United Nations, and national governments. In the UK, the National Wellbeing Programme was launched by the coalition government in 2010[11] and is a key aspect of policy making in DCMS. The ACE report on *Cultural Activities, Artforms and Wellbeing* (2015b) found 'all forms of cultural engagement and all art forms are positively associated with happiness and relaxation after controlling for a range of other determinants of wellbeing'. Research on museums and wellbeing has resulted in applications such as *Museums on Prescription,* a three-year AHRC-funded research project involving museums in Kent;[12] whilst elsewhere in Kent, Swale and Medway is one of four areas piloting the training of 'citizen to citizen' culture guides to act as mentors/intermediaries improving access to culture and arts for marginalised groups, as a way of addressing social exclusion and promoting active citizenship and cultural cohesion.[13]

Education and skills: The education and skills agenda crosscuts with other key strategic aims such as: diversity (opening up opportunities to a more diverse arts and culture work force); resilience (developing new talent and new audiences) and wellbeing (a function of the intrinsic value of arts and culture). Current trends are described by the Warwick Report as being far from promising, with significant drops between 2003 and 2013 in numbers taking GCSE Design &Technology and Drama, and a 46% fall in craft- related courses on offer (Warwick Commission, 2015). According to the CEBR report, 75% of arts and culture organisations operate apprenticeships and internships. However, the Warwick Commission (2015) argues that although the cultural and creative industries were amongst the first to create apprenticeships for higher-level training:

> … overall, the Apprenticeship landscape is far from 'friendly' for the Cultural and Creative Industries: with the majority of companies being sole-traders or operating with fewer than ten people, taking on an apprentice is a big ask. There have been significant reductions in the Further Education and Skills Budget (for England), so finding resources to create new vocational routes and qualifications for apprentices is even more challenging (48).

ACE was one of the bodies funding the **Creative Employment Programme** which supported employers in offering training through wage contributions for apprenticeships and paid internships (2013-2016). [14] Evaluation of this programme will inform ACE's approach to its planned £4m investment in 'improving access to the sector for young people from all backgrounds' (Arts Council England, 2015).

4.3   TOURISM AND CULTURE

Mention has already been made of the contribution of income from tourism to the funding of culture and the arts. According to the report by CEBR, £38m was spent by inbound tourists to Britain on arts and culture in 2011, and 32% of inbound visits (some 10m in total) involved engagement with the arts and culture (CEBR, 2015). Tourists who are attracted to Britain primarily by its culture and the arts, however, also spend money on other things. VisitBritain has estimated that 28% of total international passenger spend in the UK was attributable to 'culture and heritage' (Mayor of London, 2015). CEBR estimates that the additional activities of tourists who came to Britain in 2011 primarily for arts and culture generated a further £635m, whilst an extra £221.4m is attributable to tourists for whom the primary purpose of their visit was NOT arts or culture. According to research by VisitBritain (quoted by Howard Davies), 57% of those surveyed by the Nation Brands index in 2009 agreed that 'history and culture' is a strong influence on their choice of destination, and is therefore a strong element in Britain's competitiveness as an international tourist

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[11] https://www.gov.uk/government/collections/national-wellbeing
[12] https://www.ucl.ac.uk/museums/research/museumsonprescription
[13] http://www.cultureguides.eu/pilot-work/pilot-work-in-uk
[14] https://ccskills.org.uk/supporters/funding/england

destination (Gold *et al.* 2014). The 2015 *GfK Anholt Nations Brand Index* positions the UK 4th for tourism and 5th for Culture out of 50 nations. Out of the three attributes measured under the Cultural dimension, the attribute of being '*Interesting and exciting for contemporary culture'* ranked highly, with the UK being ranked 3rd for a 4th year in a row (VisitBritain, 2015). At the same time, research by VisitBritain with the UK's major inbound markets concluded:

> 'Visitors to Britain absorb culture and heritage in a variety of ways on holiday. It is not just about a specific attraction, but also about additional auxiliary experiences to complement and enhance a visitor's overall experience' (VisitBritain, 2014).

Culture is regarded as a key driver for tourism, with UNWTO figures estimating 37% of world travel undertaken by 'cultural tourists', with consistent growth (Calinao and Lin, 2017; Mayor of London, 2015). The issue of what can be understood by 'cultural tourism' and the nature of cultural tourism consumption will be addressed below. Inbound tourism to Britain received considerable attention and marketing investment in the run-up to 2012, the year which saw the Royal Wedding, the Queen's Jubilee, and the London Olympics. Tourism has now been identified as 'the industry that can deliver the economic legacy of the 2012 Games' (VisitBritain, 2013). Numbers of inbound tourists have continued to rise, with a total of 34.4m arrivals in 2014 representing a 15.4% growth over a five-year period. Expenditure by foreign tourists rose by 29% over the same period, to reach £21.8bn in 2014 (Keynote, 2015a). Headline figures for 2016 for inbound visits show a rise again to 37.6m.[15]

However, despite the economic importance and 'soft power' importance of Britain's inbound tourism, domestic tourism remains a large and potentially more important market, particularly outside London, and for the smaller and medium-sized attractions.

4.3.1 Domestic market

VisitEngland, reports that, despite the economic downturn, people have continued to prioritise leisure and holidays above most other areas of spending, whilst also seeking bargains and opportunities to cut costs. 'Household spending data from the Office for National Statistics indicates that while households cut back on spending overall during the downturn, spending on recreation and culture actually increased' (Trajectory Global, 2013). Britain saw a 'staycation boom' between 2008 and 2012, with the number of domestic tourists increasing by 8.7% overall (Keynote, 2013). Visitation to tourist attractions in the UK increased alongside expenditure, but this appears to have been largely due to an increase in entrance fees – smaller attractions struggled, and much of the increase in visitation was to attractions with no entrance fee. Overall, Keynote estimates that the UK tourist attractions market grew by 43.5% between 2010 and 2014, with Canterbury Cathedral consistently in the top 50 attractions. Interestingly, the new library of Birmingham was the 10th most visited attraction in 2014. According to Mintel's 2014 report on *Trends in Short City Breaks*, England dominated the short city break market, with 60% of short break holidaymakers taking their last short break in England. This, however, was down from 64% the previous year (Mintel, 2014).

It must also be noted that although the UK staycation boom reversed the previous decline in inbound and domestic tourism, VisitEngland noted persistent structural problems, which meant that, despite the boom, England's tourism continued to operate under capacity, and suffered a problem of negative perceptions with regard to quality and value for money (VisitEngland, 2011). Whilst Keynote anticipates continued growth in the inbound and domestic market, Mintel is less optimistic about the future of the domestic market, arguing that economic recovery and improving consumer confidence in the UK, combined with increased competition in the short-haul airlines market, and the high cost of travel within the UK, will signal a return overseas and an end to the staycation trend. An analysis of '*The Post- Recession Consumer'* in 2015 provides some support to this view and states that 'as we emerge from the recession, not all consumers are feeling recovery in the same way' and that there is some evidence to suggest

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[15] https://www.visitbritain.org/2016-snapshot

that consumers were expecting to take less domestic short breaks in 2016. In light of this, Trajectory predicted that in the long term 'the future of holidays is likely to be geared towards a balance of longer foreign trips mixed with a variety-domestic and abroad- of short breaks' (Trajectory, 2015). The most recent figures, however, to emerge from the VisitBritain/VisitEngland Annual Review 2015/16[16], are more optimistic but have to be interpreted in light of the immediate impact of the EU Referendum. 'In the short term, it may have delivered a boost to the domestic market,' however, the long-term impact will need to be reviewed over time. One significant figure from the *Great Britain Tourism Survey (GBTS)* reported in the VisitBritain/VisitEngland Annual Review 2015/16 is the rise in VFR trips, which increased by 13% to 40.6 million, the highest total since 2006 and representing a 15% increase year on year. This represents an important market for the region and for the continued development of cultural tourism in Kent.

In 2013, ACE and VisitEngland announced a 3-year partnership to boost cultural tourism in England, with 'a key priority being to encourage and support destinations that have real potential to grow their economies by improving their cultural tourism offer'.[17] This prompted Jonathan Mountford to observe: 'It makes sense that our cultural and tourist industries join forces, as in many cases they are two sides of the same coin' (Mountford, 2013). The *Cultural Destinations Programme* which resulted from this partnership is the source of funding for the overall Culture Kent Project commissioning this research. The focus of this partnership to facilitate 'arts and cultural organisations working in partnership with destination organisations to increase their reach, engagement and resilience through working with the tourism sector' [18] highlights a key development in the policy arena and a recognition of the need to support cross-sectoral working between tourism and culture/arts.

4.3.2 Creating and consuming culture – creative tourism

Mintel's report on *Visitor Attractions 2014* identified museums as the most popular kind of attraction in Britain, with historic houses also popular (boosted by the lack of entrance fee for National Trust members, with their mass membership). However, as VisitBritain research amongst key inbound markets shows, going to pubs is an equally important activity for inbound tourists wanting to experience a slice of British culture (VisitBritain, 2014). The growth of creative industries as a sector, and the breaking down of the boundaries between arts, culture, heritage, and creativity, as noted earlier, alongside a move away from the notion of culture as 'high art' to embrace more informal and demotic expressions, have led to a proliferation of cultural tourism styles and modes of consumption, beyond sightseeing and visiting heritage. Smith (2003) identifies a recent trend towards *creative tourism*, spearheaded by UNESCO, which in 2004 launched its *Creative Cities Network* and set about defining and building a creative tourism movement as a sustainable development strategy.[19] UNESCO defines creative tourism as:

> … travel directed toward an engaged and authentic experience, with participative learning in the arts, heritage, or special character of a place, and it provides a connection with those who reside in this place and create this living culture' (quoted in Smith 2003).

Under this rubric, Smith distinguishes three kinds of creative tourism: (1) an emphasis on 'living like a local', and spontaneous authentic encounters with a local culture and way of life, which may include learning new crafts and skills with a specific connection to the local landscape or culture; (2) an emphasis on 'exploring and expressing one's creative potential whilst on holiday', with little reference to the local context, and involving teachers who may be creative practitioners not indigenous to the region; (3) a focus on the enjoyment of local creative expressions such as film and TV, fashion, design and architecture, which Smith refers to as 'creative industries tourism'. Each of these types demonstrates the evolution of tourism from 'service industry' to 'experience economy', with, at its heart, an extremely broad and fluid understanding of culture and cultural consumption. ***The challenge for Destination***

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[16] https://www.visitbritain.org/annual-review/annual-review-2015-16

[17] http://www.artscouncil.org.uk

[18] www.artscouncil.org.uk

[19] Towards Sustainable Strategies for Creative Tourism. UNESCO Creative Cities Network 2008
http://unesdoc.unesco.org/images/0015/001598/159811E.pdf

Management Organisations is, how to uncover these layers of culture in their particular destination, and make them accessible to the visitor?

VisitEngland's review of domestic leisure trends for the next decade (Trajectory Global, 2013) highlights a number of key social, demographic and consumer trends influencing UK domestic tourism. These include: increasing time pressures and responsibilities, especially on the 35-49 age group, sandwiched between an ageing population and rising birth rate, opening the way to more intergenerational travel and a focus on quality time and 'treats'; increasing ethnic diversity and a rise in the number of UK residents born outside the UK, giving rise to a tourism market whose needs are as yet poorly understood; 'recessionary-led thriftiness' – seeking value for money, even in luxury products; a shift from conspicuous consumption to achieving social status through the acquisition of cultural capital, knowledge and skills, through creative tourism, active tourism, hobbies etc. Whilst the report highlights a growing appetite for cultural experiences amongst domestic tourists, two contradictory trends emerge in the quest for ways to simplify complexity and relieve time pressures:

- Enhanced use of mobile technology, offering increased individualisation and tailoring of products and availability, and also the immediacy of social media such as Facebook and twitter, which enable DMOs to tap into the visitor's 'fear of missing out'.
- The *slow movement*, which focuses on the quality rather than the quantity of experience. The Slow City movement, which is also linked to the slow food movement focusing on local food traditions and sourcing, started in Italy in 1999, and now has more than 100 member cities worldwide, including 5 in the UK.

4.3.3   Delivering cultural/creative tourism

A number of cities and regions in Britain have developed pioneering cultural tourism strategies. Liverpool's experience as *European City of Culture 2008* highlights the need for long-term evaluation in order to understand the sustainability of landmark cultural events-led tourism (Garcia et al, 2010).

The cultural framework for Belfast *(Cultural Framework for Belfast 2012-2015,* Belfast City Council, 2012) aimed to achieve the twin goals of boosting the city's tourism and improving local participation in culture and the arts. The strategy set itself the task of 'making visible what already exists under the surface of the city's life', in order to express the range of Belfast's culture and identity, and required a long-term input of research, coordination and building networks and support, which started in the 1990s. Bringing the culture and tourism communities together for cultural planning highlighted a number of issues:

- lack of communication or awareness between the two communities, and the lack of a shared context
- different programming horizons driving the two sectors
- lack of knowledge concerning appropriate tourism offer on the part of cultural organisations
- the problem of reaching a 'critical mass' of cultural programming to sustain tourism packages, and the need to grow home audiences in order to create the critical mass for tourism
- the need for culture to be place specific and authentic – not international and footloose
- the need for a range of venues and prices
- importance of creating opportunities to encounter culture casually and informally.

An important lesson from Belfast's experience was the need to find creative ways to enable the cultural and tourism sectors to work together.

4.4   SUMMARY

The analysis of current trends in the cultural tourism landscape reveals important opportunities for developing the sector in Kent. The emerging cultural and creative tourism model demonstrates the evolution of tourism from 'service industry' to experience economy', with, at its heart, an extremely broad and fluid understanding of culture and cultural consumption. Arts and cultural organisations have the capacity to play a key role in place-making and

in the generation of innovative new experiential products for tourism, whilst tourism can contribute to the growing of audiences and markets for arts and cultural organisations. The next section of the Evidence Review will consider how the cultural tourism offer can be defined in terms of the product, destination and experience.

Harbour Arm Artworks, Folkestone. Image courtesy of Creative Foundation

5 CULTURAL TOURISM OFFER - PRODUCT, DESTINATION AND EXPERIENCE

5.1 INTRODUCTION

At the heart of the *Cultural Destinations Programme* is cross-sectoral working between tourism and culture/arts set within the context of the contemporary cultural tourism landscape; analysed in the previous section of the review. In order to understand the real potential of cultural tourism and facilitate the development of cultural destinations it is important to understand the nature of the tourism and culture/arts relationship and how it is represented. For Culture Kent to use cultural tourism as a vehicle through which to showcase Kent's cultural assets and extend its reach by attracting new audiences, it needed to understand how the cultural tourism product and destination can be defined.   As the previous section has identified the move from a service industry to an experience economy, any definition of cultural tourism has to include the cultural tourism experience and its place setting; the cultural destination. These are complex issues and the following section of this report will attempt to explore them in order to contribute to the body of knowledge required to underpin the work of Culture Kent and other organisations/bodies linked to cultural tourism/destinations in Kent.

5.2 NATURE OF THE TOURISM AND CULTURE/ARTS RELATIONSHIP, AND ITS REPRESENTATION

Broadly speaking, three different aspects of the tourism and culture/arts relationship and its representation emerge from the evidence:

5.2.1 Symbiotic economic relationship:

 As highlighted in section 4 of this report, tourism is expected to play an important role in diversifying income to the arts and cultural sectors and reducing reliance on public sector funding, by expanding the audiences and markets for cultural products. At the same time, the value of arts and culture in boosting tourism, creating a sense of place, and differentiating destinations in an increasingly crowded and competitive market place, is seen as crucial.   Evidence of this relationship can be found in studies demonstrating the impact of cultural regeneration projects, mega-events, or the opening of a flagship cultural attraction, and includes:

- increased visitation to the destination, or to other cultural attractions in the destination
- increased bed capacity, and a rise in hotel occupancy rates
- increased spending, in both cultural and non-cultural attractions (e.g. local shops and services)
- increased employment, direct and indirect
- increased length of stay by visitors
- penetration into new tourist markets
- increase in number of first time visitors
- rising media profile – expressed in number of positive stories and images about a destination, and also in terms of the PR value (what it would have cost to obtain the equivalent promotional publicity commercially).

In other words, this relationship is expressed largely in quantitative terms, as found in reports evaluating the impact on the visitor economy of cultural tourism strategies and cultural programmes in Folkestone (Creative Foundation 2014), Glasgow (Glasgow City Marketing Bureau 2007), Manchester (Visit Manchester 2014, New Economy Manchester 2013), Liverpool (Garcia *et* al, 2010), and Margate (Turner Contemporary, 2015). The economic impact studies on cultural tourism being gathered by a growing range of destinations around the country provide a rich data set for comparative analysis and benchmarking. ***What is missing so far are the longitudinal studies which would shed light on the sustainability of these impacts***.

5.2.2   Spatial relationship:

The spatial relationship between tourism and culture/arts refers to the planning function, locating bundles of activities in specific locations, and making them attractive and accessible to visitors. This is particularly relevant to Culture Kent as a project funded through the *Cultural Destinations Programme*. Research has found that 'creative clusters' are particularly effective in stimulating collaboration and cooperation between organisations, and enabling economies of scale in the sharing of cultural infrastructure; in the context of the cultural destination, they create foci of interest for visitors, and help make the cultural attractions of a destination more accessible and easily navigable. The cultural strategies for Glasgow (Glasgow City Council 2006), Belfast (Belfast City Council 2004), and Liverpool (Garcia *et al,* 2010) all lay considerable emphasis on the planning function in creating easily identifiable cultural and historic quarters, clear signage and maps, and joined-up transport systems or walking itineraries for visitors. Another component of this spatial relationship is the investment in the public realm, to create distinctive and pleasant environments, which also lend themselves to the iconic representation of the destination – for example, Salford Quays, the seafront at Margate, Folkestone Creative Quarter – and gathering points for visitors adding to the ambiance and buzz of creative destinations. These are important elements in the informal, serendipitous aspect of the cultural experience, as outlined in section 4.3 of this report.

Incorporated in this spatial planning dimension is also a temporal dimension reflecting peaks and troughs in demand linked to **seasonality**. This has implications for destination management in terms of the impacts of crowding and the capacity of the transport infrastructure at times of peak demand. Conversely, the atmosphere of some cultural destinations may suffer a 'deadening' effect at times of low demand. Research carried out in Sicily (Cuccia and Rizzo, 2011) suggests that cultural destinations generally suffer less from seasonality in tourist flows, suggesting that cultural tourism can have a role to play in combating the effects of seasonality in some tourist destinations, being more linked to the timing of cultural programmes and events, and the availability of year-round heritage attractions, than, for example, beach tourism. The paper goes on to warn, however, that the potential for complementarity between different forms of tourism may be overstated.

Thus, it is important to note that *whereas the economic relationship between tourism and culture/arts is represented primarily in sectoral terms, the spatial relationship works on the level of actual organisations and businesses, and place-specific representations.* This will be addressed further in the review (Section 7) and the subsequent research related to organisational perspectives of cross-sectoral working.

5.2.3   Wellbeing and social inclusion relationship:

The intangible benefits of cultural participation have already been touched on in an earlier section (section 4.2.2), in the context of the *Museums on Prescription, Happy Museums,* and *UCL Museum Wellbeing Measures* projects. The benefits of cultural participation in combating social exclusion and enhancing physical and psychological wellbeing are well documented. Community wellbeing, social inclusion and empowerment are prominent elements in the cultural tourism strategies reviewed for this report. The vibrancy and diversity of local communities and their cultural expressions, such as food and festivals, feature strongly as attractions in the place representations of cultural tourism destinations. A resident population actively involved in local cultural life is considered vital for sustaining the cultural programmes and attractions that form the cultural tourism offer, and for creating an atmosphere of cultural vitality that is an important element in the informal cultural tourism experience. There is, however, a mismatch in tourism and art/culture representations of this relationship. Whilst social and cultural diversity features strongly in representations of the arts/culture relationship, it is less evident in representations of the cultural tourist. Cultural destination strategies tend to aim for a high spending ABC1 tourist market, and images accompanying e.g. Glasgow's *Cultural Tourism Strategy* (2007) are predominantly young, white and professional, in keeping with their brand *Glasgow: Scotland with Style*. There is a tension here that remains unresolved.

5.3 DEFINING THE CULTURAL TOURISM PRODUCT, DESTINATION & EXPERIENCES – CHALLENGES

The main challenges to producing a working definition of the cultural tourism product, destination and experiences, lie in the multifaceted and variable nature of all of these elements.

5.3.1 Challenges of defining the cultural tourism product:

VisitBritain's overview of culture and heritage (VisitBritain, 2010) highlights the importance of 'history and culture' in Britain's tourism brand, but points out that it can be difficult to separate 'Culture' and 'Heritage' in the mind of the consumer:

> 'Britain's culture and heritage offering is expansive and exists in many different forms such as built/historical heritage, popular culture, living culture, shared culture, cultural events, culinary culture, and cultural products to name but a few' (VisitBritain, 2010:4).

The report notes that visiting a pub and attending a sporting event may equally be regarded as forms of cultural tourism activity, but adds:

> … when we drill down, three key pillars seem to exist: Cultural Heritage (e.g. Shakespeare), Built or Historical Heritage (e.g. Tower of London) and Contemporary Culture (e.g. modern art, theatre).

Nevertheless, this neat classification becomes further complicated by the actual behaviour and expectations of cultural tourists, as shall be seen below.

The list of cultural tourism products to which culture, heritage and the arts give rise is long and varied, and includes Architecture Tourism, Industrial Tourism, Film and TV Tourism, Literary Tourism, Dark Tourism, Garden Tourism, Food Tourism, to name but a few. *Tourism Intelligence Scotland* (2012) offers a guide to businesses wanting to participate in cultural tourism, encouraging them to connect up with cultural attractions and events and offer them to visitors in the form of tours or other kinds of package. As already alluded to in sections 4.3.2-3, traditional sightseeing is now supplemented by a range of experiential 'creative tourism' packages offering opportunities for learning, gaining new skills, or 'living like a local' (c.f. Smith, 2003). Thus 'textiles and crafts', which feature in the cultural attractions identified in *Tourism Intelligence Scotland*'s guide, could be packaged as guided tours, shopping packages, or residential workshops teaching spinning, dyeing and weaving skills to visitors over several days.

As Lehman et al (2014) point out, there is a difficulty in identifying the nature of the cultural product when it is not produced for a specific market or consumer, but rather, for the producer inside a complex arts/culture supply chain involving a wide range of expertise, orientations and values – represented, for example, by curators, writers, artists, performers, audiences and publics. ATLAS distinguishes two different categories of cultural tourism definition, the first capturing the **motivations and meanings** attached to cultural tourism as an activity, whilst the second category represents **product based definitions** focusing on the types of cultural venues visited by tourists (Culture24, 2012). As the *Culture24* Report on engaging cultural tourists argues, there is a need to replace the 'supply driven' arts and culture model with one that seeks to understand and integrate the 'strategic needs' of cultural tourists in terms of their motivations and behaviours. This is an important point for consideration and will be addressed in the review of consumer perspectives in Section 6 of this report.

5.3.2 Challenges of defining cultural tourism destinations:

These exist at a variety of scales, from the national (for example, the representation of the whole of Britain or its constituent countries as cultural tourism destinations by marketing bodies such as VisitBritain and VisitEngland) to

the level of city (small towns, such as Hay-on-Wye, which in addition to its celebrated annual literary festival now offers year round tours);[20] and diffuse regions (corridors or cultural routes, such as 'Herriot Country', '1066 Country'), or the recently accredited European Cultural Route 'In the Footsteps of Robert Louis Stevenson'. [21] Such destinations link a core and hinterland of networked sites, organisations, and visitor attractions (The Culture Module 2012).

There are a wide range of urban cultural destinations, from post-industrial cities such as Liverpool, Manchester and Bradford, to seaside holiday towns such as Margate and Folkestone, all of which have introduced cultural tourism as a means of replacing or supplementing their earlier primary economic activity. According to research carried out at Loughborough University, London is identified as part of an elite of 'Alpha World Cities', setting it apart from other British urban centres which have reinvented themselves as cultural tourism destinations, such as Glasgow, Liverpool and Manchester (Mayor of London, 2007). The path to becoming a cultural destination has been very different for regional towns and cities, from the post-industrial cities who followed a trail blazed by similar cities in the USA following the economic recession of the early 1980s (Murphy and Boyle, 2006), to the seaside renaissance kick-started by the DCMS-led *Sea Change* initiative in 2008. [22]

Whilst some of these destinations, such as Hay-on-Wye, have a clear cultural tourism identity, this is not the case for many of the others. As VisitBritain observes: 'Visitors to cities often don't define themselves as cultural tourists – culture may be an add-on, or part of a mix' (VisitBritain, 2010). Blackpool's reinvention as a 'cultural destination' is still a work in progress, combining its rediscovery of its origins, Victorian built heritage and social history with a continuous tradition of being at the forefront of innovations in popular culture and mass leisure consumption. A publication by Historic England on *Blackpool's Seaside Heritage* (Brodie and Whitfield, 2013) showcases the cultural heritage aspect by providing the visitor with a guide to sites around the town exemplifying its multi-layered built heritage. Other seaside towns such as Margate and Folkestone are following a creative industries-led path to regeneration. What these diverse destinations have in common is that they aim to offer the visitor the opportunity for various kinds of 'cultural experience'. This is discussed in more detail in the sections below.

5.3.3   Challenges of defining cultural tourism experiences:

The categories and sub-categories of culture, heritage and the arts, identified earlier, tend to break down when considered in the context of visitors' actual behaviour and expectations. Research quoted by Lord (1999) for the American context supports similar findings for Europe and the UK, and distinguishes between the 15% of tourists who identify primarily as 'cultural tourists', and for whom the cultural attraction is the primary motivation, and the rest for whom culture is an 'adjunct' to other activities and attractions with which they engage in a given destination. In the Algarve, for example, where the tourism offer is strongly based on its sun-sea-and-sand product, research found that an adjunct cultural tourism offer, in the form of a programme of cultural events, festivals, historic heritage and market towns, is effective in raising tourist satisfaction and encouraging return visitation (Oom do Valle *et al*, 2011). Thus, the type of cultural experience demanded by cultural tourists is wide ranging:

> Whilst it could relate to a deep engagement with museum objects it could also relate to a fondness for the venue's overall atmosphere. As Richards indicates 'it seems that **cultural tourism is becoming an experiential product**, in which the visit is judged in terms of all attributes of the attraction and not just its cultural value' (Culture24, 2012) *[Emphasis added].*

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[20] http://www.haytours.org

[21] http://www.stevensonway.org.uk/european-cultural-route.aspx

[22] http://www.wired-gov.net/wg/wg-news-1.nsf/0/254006D970EF002D80257421002100F4?OpenDocument

This view is backed up by VisitBritain's observation that, whilst Britain's built heritage is seen as world class and iconic, and is something that all visitors want to experience regardless of age, 'it does not provide a sense of urgency to visit now' (VisitBritain, 2010). Adding an exciting twist in order to market a heritage attraction more effectively – for example, by combining the visit with another cultural event, such as a concert, or a fashion show – is important in order to 'surprise and engage visitors on a more emotional level' (ibid).

This blurring of the experiential with other modes of cultural tourism engagement is confirmed in research Cetin and Bilgihan (2016) conducted in Istanbul to identify the key elements of visitors' cultural experience of the city. '*Culture and heritage*' was one of five key elements to emerge from the interviews, the others being *social interaction*; '*local authentic clues*' giving a sense of place; *service quality and cleanliness* of the city; and the *challenges* of navigating the city, which, whilst some were clearly negative (e.g. traffic, toilets) were perceived by tourists as part of their experience (Cetin and Bilgihan 2016). The research concludes that unique, positive experiences have potential for differentiating destinations in an increasingly crowded marketplace.

Generally, the quality of **authenticity** emerges as a key feature of the cultural tourist experience. However, this is something of a 'black box' term, the precise nature of which is hard to pin down. Lehman *et al* (2014), who highlight the complex nature of the supply chains in which cultural products are embedded (see above), identify two key questions, which suggest the lines of a future research agenda:

> *What parts of the arts/culture supply chain 'product' provide sufficient authenticity? And, what do supply chain organisations have to do to establish authenticity and communicate it to their consumers?*

5.4   DISTINCTIVE CHARACTERISTICS OF CULTURAL DESTINATIONS

Cultural destinations provide the spatial settings for the provision of cultural products and services at different scales. Above and beyond this, they are places with their own identities, which also become part of the cultural tourism mix.

Much of the evidence for this section of the review is drawn from the cultural strategies of cities such as Glasgow, Liverpool, Manchester, and Belfast, and towns such as Margate and Folkestone. A comparative study of cultural tourism development in British towns and cities notes the following key development factors:

> 'developing tourist accommodation; leisure and retail services; creation of heritage attractions; flagship developments; cultural events and festivals; reclamation and regeneration of derelict land' (Murphy and Boyle, 2006)

and adds to this list the level of public sector support available for tourism; the involvement of the private sector through mechanisms such as Development Corporations (citing in particular the role of the Cardiff Bay Development Corporation); and on-going investment in maintaining and updating facilities and attractions (ibid).

Benchmarking: In what is regarded as an increasingly competitive and crowded marketplace, cultural city destinations benchmark themselves against other cities internationally, as well as nationally. London, which, as already noted, is classed as an 'Alpha World City', benchmarks itself against cities such as Tokyo, Paris and Chicago (Mayor of London 2007); whilst regional cities such as Glasgow, Manchester and Liverpool, benchmark themselves against other British regional cities, but also internationally, with cities such as Barcelona, Rome, Gdansk, Hyderabad, Valencia and Vancouver (c.f. Glasgow City Marketing Bureau, 2007).

Range of cultural attractions: The presence in or near a cultural destination of a UNESCO World Heritage Site is perceived as a major advantage in branding a destination and raising it above the competition. London has four world heritage sites, more than any other of its benchmarked competitors (Mayor of London, 2007). Liverpool's *Maritime Mercantile Heritage* is UNESCO listed, and the listing of the *Antonine Wall* by UNESCO in 2008 was considered a major coup for the Glasgow cultural strategy, although the city's Charles Rennie Mackintosh buildings were unsuccessful in making it onto the UNESCO tentative list (Glasgow City Council, 2006). Additionally, both Liverpool and Glasgow have joined the UNESCO Creative Cities Network, being recognised as UNESCO Cities of Music. [23] Both Liverpool and Glasgow have made much of the opportunities of European Cities of Culture status and the hosting of international cultural and sporting events in building capacity and infrastructure in their cultural tourism offer (Glasgow City Marketing Bureau 2007, Glasgow City Council 2006, Garcia *et al*, 2010).

Much of the value of cultural heritage honey-pots such as UNESCO world heritage sites and flagship institutions such as the Lowry at Salford Quays or the Turner Contemporary in Margate, lies in the spin-off benefits to other cultural attractions in the area, and the opportunities to seed other kinds of cultural activity and engagement that feed into the creation of a diverse, experiential cultural offer. *Glasgow's Cultural Strategy* 2006 highlights the benefits of UNESCO recognition of built heritage sites in and around the city for raising awareness of its status as a 'historic city':

> Glasgow City Council is committed to the development of a Local History and Archaeology Strategy that will provide a co-ordinated approach to the management and display of the city's archaeological and historical assets. This will increase opportunities for involvement by local communities, interest groups and schools.

Local history is also recognised as being of 'crucial importance in developing local pride and a constructive sense of identity for individuals and the city as a whole' (ibid).

According to the *London Cultural Audit,* 'UNESCO World Status designation is … ambiguous in what it says about a city's present-day culture'. In this respect, key elements identified in London's cultural audit combine elements of **cultural consumption, production, and creativity**, and include: *museums, green spaces, libraries, music, cinemas and performing arts venues, internet infrastructures, books and press, cultural vitality and diversity, alternative and 'backroom' spaces, festivals, universities and international students, cultural infrastructure of diaspora communities (e.g. community centres, theatre groups), number and range of venues and live performances.* It highlights the importance of an *educated population with enough money to sustain viable audiences and publics to support cultural production* (Mayor of London, 2007).

Flagship arts institutions such as the Lowry and Turner Contemporary have a key role to play as hubs for fostering broader creative engagement. The Lowry has provided over 1500 hours of studio time to new and emerging artists, and in 2012-2013 subsidised theatre tickets for Salford residents to the value of £135,000 (New Economy Manchester 2013); whilst Turner Contemporary linked its 2014 Mondrian exhibition to a programme of summer events in Margate, Ramsgate, Broadstairs and the Thanet area, offering the Turner as a platform for other arts groups to build from and draw new audiences in the gallery (Turner Contemporary, 2015). The recent report on Turner Contemporary, '*Art Inspiring Change: Social Value Report (15/16)* (Jackson *et al*, 2016) demonstrates the impact of Turner Contemporary on an evolving 'story of change' in Margate through research and engagement with key stakeholder groups. Interesting, with respect to the development of cultural destinations and the spin-offs that can be created by flagship institutions, they identify a set of secondary stakeholders (local retailers, non-visiting local residents and local artists) who benefit from the presence of the Gallery, even though they might not be directly involved with the Turner Contemporary and highlight positive outcomes related to:

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[23] http://www.unesco.org.uk/news/liverpool-named-the-uks-new-unesco-city-of-music/

'increased footfall in the retail areas of the town, increases in tourism, a changed visitor demographic, the growth of a creative and cultural industry infrastructure and increased levels of social value' (Jackson *et al*, 2016:6).

As Victoria Pomery, (Director, Turner Contemporary) articulates in the forward to the report (Jackson *et al*, 2016):

'At a time when our communities are fractured and divided, this research brings great hope that art really does inspire positive change, and can help us to build a stronger, more creative and connected society in the future' (:4).

Public sector role: Municipalities and city authorities, national government and EU funding programmes, play a leading role in coordinating and developing cultural destinations. The widely accepted model is of 'public sector pump priming in attractions and environmental improvements, and city marketing to create employment and encourage inward investment to benefit residents as well as visitors, leading to enhanced city marketing and civic pride' (Murphy and Boyle, 2006).

In Glasgow, the City Council has worked in partnership with Scottish Enterprise Glasgow to build tailored business development support in the creative industries. This includes the establishment of the Glasgow Film Fund and FilmOffice, designed to make Glasgow a production city for film and cinema; financial support to provide studio and workshop accommodation for artists, a business support programme for Glasgow design companies, and the facilitation of major themed developments such as the digital media campus and city science campus. In addition, the city has invested in community sport and arts facilities; in galleries and venues; in parks and open spaces; and has coordinated the bidding to host major events (Glasgow City Council, 2006).

The 2008 *Cultural Vision* for Margate, in common with other developing cultural destinations, seeks to make the link between culture, creativity and quality of life, with the Town Council and Margate Renewal Partnership taking the lead role in coordinating services, identifying and bidding for sources of investment funding (Margate Renewal Partnership, 2008). Key features of this strategy are the acquisition of stock for 'creative work spaces' and capital investment in the public realm, especially the sea front.

An important role of the public sector is in building partnerships and coordinating activity with the private sector. Mention has already been made of the Local Development Corporation model, and of initiatives such as the *Tourism Intelligence Scotland* practical guide informing and connecting tourism businesses with the cultural offer (Tourism Intelligence Scotland, 2012). Lord (1999) (*see Figure 1 over page*) makes a very strong case for the importance of building strategic partnerships between different elements of the tourism and cultural offer, to maximise the value of 'adjunct' cultural tourism by packaging cultural products of different types, and also building partnerships and packages combining cultural and non-cultural products.

Only through this strategy can you maximize the high-end benefits of cultural tourism without incurring huge marketing costs.

Lord (1999) advocates an active programme of networking between cultural and tourism businesses and professionals, advising:

You must constantly remember that while we may make a distinction between visits to restaurants and sports events, and visits to museums and other cultural attractions, tourists do not – **they seek a total experience that helps them understand a location and its people**. Partnerships can make this happen. *[Emphasis added]*

This clearly lays at the heart of the *Cultural Destinations Programme* and the vision of Culture Kent to create new strategic relationships between the cultural and tourism sectors. It will be considered in more depth in Section 7 of this report.

Figure 1: Partnering and Packaging Model

Among cultural products of the same type	Among different cultural product types	Among cultural and non-cultural products
EXAMPLES Passport packages Themed packages	Festivals and special events Arts districts	Day of the week Weather Time of day Specific market segments
BENEFITS Reduces compeitition Extends length of say and spending	Reduces competition Increases efficiency of delivery Increases perceived value Extends the market	Reaches the broadest market Extends tourism season Benefits tourism operators
IMPACT Limited - appeals to 'greatly motivated' tourists	Moderate - attracts 'motivated in part' and 'adjunct tourists	Broad- reaches'motivated in part', 'adjunct' and 'accidental' cultural tourists

(Source: Lord, 1999)

Community role: As already indicated, the community is expected to be both a key beneficiary and a key ingredient of cultural tourism strategies. All the strategies recognise the importance of the 'local welcome', and the training of volunteer 'Local Ambassadors' is a common feature of tourism in cultural destinations. Kent is a member of the *Global Greeters* network, with volunteer greeters available to book in 14 districts of the county, [24] offering the experience of authentic local encounters that are a valued element of the experiential offer. Community oral history and social history projects feed into the interpretation and animation of public spaces.

Role of internet and mobile technology: Turning a *place* into a *cultural destination* is largely a matter of bringing out the essential qualities and features of a place and making them accessible to the visitor. Internet and mobile

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[24] https://www.visitkent.co.uk/stay-and-eat/getting-here/kent-greeters/

technologies are playing an increasingly important role in guiding the cultural tourism experience and mediating the sense of place, and are particularly apt for meeting the growing demand for spontaneous and authentic cultural experiences by directing visitors to lesser known cultural attractions and 'alternative' venues. Applications such as *The Creative Tourist*, which grew out of the Manchester International Festival 2007, provide the means for visitors to the north-west to find out what's going on, and where:

> At first glance, Creative Tourist is easy to define. It is a consumer website – creativetourist.com – supported by seasonal tourism campaigns. It carries daily, year-round content that provides the 'drip, drip' of information required to change perceptions. But that's just the visible part of the iceberg as, below the waterline, so much else occurs. It is here that partnership working comes to the fore. It is here that the project focuses on the needs of the market, rather than the wants of individual venues. It is here that new cultural products are developed (Palmer 2013).

The capacity to provide content-rich instant updates to mobile phones and tablets makes available a powerful tool to guide visitor flows in real time, within the destination, and to allow:

> … 'engagement with the user's complete information journey – publishers are viewing the tourist's complete 'arc' (planning to post-trip and memories) as an opportunity for continued provision of information and engagement' (Culture24 2012).

The possibilities of digital technologies are particularly powerful in the kinds of destination that are not so readily accessible or apprehensible to the visitor. These include more diffuse regions or corridors, where mobile technology allows core-hinterland regions to be hooked together more effectively in terms of image, infrastructure and accessibility (The Culture Module 2012); and regional cities, which often appeal to cultural tourists' desire to discover something different and connect with the people, but where lack of specific knowledge may be perceived by potential visitors as a barrier (VisitBritain, 2010).

5.5 WORKING DEFINITION OF THE CULTURAL TOURISM PRODUCT AND THE CULTURAL DESTINATION

As outlined earlier, the terms 'cultural tourism' and 'cultural destination' articulate a complex and diverse array of activities, behaviours, experiences, motivations, mobilities, and spatial relationships. It has been argued that cultural tourism definitions tend to have a supply-side bias which ignores the complex ways in which tourists engage with culture and process their experience (Culture24, 2012). The Culture24 (2012) report proposes the following as an 'end-user focused' working definition of cultural tourism:

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

Striking features of this definition are the lack of reference to a cultural tourism product (the 'product' is subsumed in different kinds of cultural space such as 'heritage sites', 'museums' etc.) and the absence of any sense of the importance of place – movement, rather than location, is emphasised in this definition. This is consonant with the emphasis in, for example, the Lowry's report, on providing access to a world stage:

> Around a quarter of its shows are either world or UK premieres and/or international calibre shows only available to audiences in the North West because of the presence of the Lowry (New Economy Manchester, 2013).

Murphy and Boyle's (2006) comparative analysis of cultural development in British cities raises the issue of whether the adoption of tried and tested formulae for creating 'cultural cities' runs the risk of producing generic cultural tourism products and destinations. Indeed, **the cultural destination itself IS the cultural tourism product**, offering visitors the spatial framework for a **'total' cultural experience** that blurs the industry driven category distinctions between different genres of cultural product and modes of engagement and enjoyment.

The proposed working definition, therefore, aims to link product with destination, rather than offer a separate definition for each, as follows:

Figure 2: Definition of a Cultural Destination

DEFINITION

Cultural Destination

cultutral destination

A cultural destination is a networked space delivering a total experience to visitors that helps them understand a location and its people, through history and contemporary culture.

cultural destination

Developed as part of the Culture Kent Research Programme: Audit of the Cultural Landscape Evidence Review

This definition builds on Lord's (1999) recognition of the importance of linking the 'greatly motivated' and 'adjunct' cultural markets within a destination by means of creating partnerships and packages between the cultural and non-cultural offer. This is also a theme that will be taken up again when the review examines the nature of the cultural tourism consumer (Section 6). The working definition further refers to the role of IT and mobile technologies in pulling the destination together and making it apprehensible and available to the visitor (c.f. Palmer 2013, Culture24 2012, The Culture Module 2012), and leaves open the question of destination boundaries to include destinations of different scales, diffuse regions, routes and corridors (The Culture Module, 2012). The definition does, however, come down on the side of recognising the importance of location, and delivering a sense of place as part of the cultural offer.

5.6 SUMMARY

Through exploring the nature of the cultural tourism offer the review has supported the need to consider both consumer and organisational perspectives. As cultural tourists do not make the same 'supply side' distinctions between destination attractions and cultural activities as professionals working in the field, it is essential to understand how cultural tourists make sense of the cultural destination (see Section 6). Furthermore, of relevance to Culture Kent is the focus on 'place' and the cultural tourism experience, where collaboration is more strongly driven by location and proximity, rather than sectoral classification. This aligns with need the need to explore cultural tourism from the perspective of the organisations involved in the supply chain (see Section 7).

6   CONSUMER PERSPECTIVES

6.1   INTRODUCTION

Previous sections of this review have identified the importance of cultural tourism (section 4.3) and explored the premise that the terms 'cultural tourism' and 'cultural destination' articulate a complex and diverse array of activities, behaviours, experiences, motivations, mobilities, and spatial relationships (section 5.5). Furthermore, section 5.5 highlighted the argument that cultural tourism definitions tend to have a supply-side bias which ignores the complex ways in which tourists engage with culture and process their experiences (Culture24, 2012). This emphasises the need for more consumer research. To address this gap, this section will explore the nature of the cultural tourist, how they perceive cultural destinations/experiences and the challenges faced by the tourism and culture/arts sectors in their efforts to profile and segment cultural tourists in a meaningful way.

6.2   UNDERSTANDING THE CULTURAL TOURIST MARKET

6.2.1   Consumer trends

A number of trends can be identified as influencing the emerging nature of the cultural tourism consumer. VisitEngland's review of domestic leisure trends (Trajectory Global, 2013), reviewed previously (section 4.3.2), reveals a number of trends with specific relevance to the cultural tourism consumer, namely: increasing time pressures and responsibilities, a focus on quality time and 'treats', a shift from conspicuous consumption to achieving social status through the acquisition of cultural capital, knowledge and skills, through creative tourism and hobbies.

Other commentators (for example, Calinao and Lin, 2016; Cetin and Bilgihan, 2016; Jovicic, 2016; Smith, 2016) identify trends related to the transition into the ***experience economy*** and how it impacts on the cultural tourism consumer, in the form of:

- a 'growing consumer need for self-realisation and self-affirmation. Instead of passive consumption, cultural tourists demonstrate a proactive approach to meeting their needs, wanting to actively participate in creating experiences while travelling' (Jovicic, 2016:611); and
- a move away from tangible (i.e. built heritage and museums) towards the attractiveness of the intangible qualities such as image, lifestyle and atmosphere attributed to the centrality of 'experience' (Jovicic, 2016).

An understanding of these trends and how they impact on the cultural tourism consumer, allows us to understand that **'cultural tourism is as much based on experiencing as it is on seeing'** (Smith, 2016:40). As such, previous definitions of cultural tourism limited by a narrow view with too much emphasis on the act of visiting a museum, theatre or gallery, need to be developed to encompass a more experiential perspective (Smith, 2016). In order to achieve this, it is crucial that the sector has a sound understanding of the cultural tourism consumer and how they are drawn to and experience destinations. Further implications of such trends are that that cultural tourism 'providers' have to increasingly focus on achieving a 'close interaction with consumers and co-creation of high quality experiences' (Jovicic, 2016:605) as a means of differentiation (Cetin and Bilgihan, 2016). This can be summarised as the role of the visitor shaping/being actively involved in the creation of their own experiences (Smith, 2016).

This can additionally be linked to the increasing need to **search for genuine 'authentic' experiences**, as the *Cultural Tourism Vision for London 2015-2017, Take a Closer Look* (Mayor of London, 2015), identifies 'more and more often' cultural tourists are 'looking to experience distinctive, local culture too' (: 28). This reinforces the point referred to in the OECD (2009) report on the *Impact of Culture on Tourism* (cited in Kastenholz et al, 2013) that 'from a destination point of view, cultural resources must be acknowledged as drivers of attractiveness and competitiveness,

creating 'authenticity' and distinctiveness in this important and increasing global tourism market' (:345). From a Kent perspective, it is important to explore how cultural experiences are currently perceived by visitors and non-visitors in order to inform how the County should position itself as a cultural destination. If authenticity is increasingly important to the cultural tourist, then how can this inform the positioning of the County and the targeting of key target markets. This relates to the question raised by Lehman et al (2014) as part of their consideration of a cultural tourism research agenda; what parts of the art/culture supply chain 'product' provide sufficient authenticity? And, what do supply chain organisations have to do to establish authenticity and communicate it to their consumers?' (:158)

The impact of the **shared economy** must also be recognised in terms of the way in which it is shaping consumer trends, with respect to the way in which consumers search for, and are influenced by, information sources, and in turn share experiences related to cultural tourism:

> 'How tourists discover culture is also changing, with technology, independent digital media and even tourists themselves taking the lead' (Mayor of London, 2015:29).

With the cultural tourism consumer being increasingly influenced by complex and dynamic forces, it is crucial that both academic and applied sources are brought together to examine how cultural tourists can be better understood and furthermore, profiled, with specific reference to their socio-demographics, motivations, decision-making and behaviour.

6.2.2   Socio-demographic characteristics

Whilst it must be accepted that socio-demographics alone cannot provide adequate descriptors of cultural tourism segments, many studies (for example McKercher and Du Cros, 2002, and Tien, 2008: cited in the Culture Module, 2012, Richards, 2007 cited in Kastenholz et al, 2013) claim that cultural tourists are more likely to hold particular characteristics based on their age and occupation:

- cultural tourists are thought to be older, with the added assumption that an individual's interest in culture increases with age (Richards, 2007) and are attracted more to heritage attractions, in contrast to the younger audiences being more drawn to 'popular' cultural attractions (The Culture Module, 2012)
- they are thought to be more educated, more professional and with higher incomes, 'who spend large amounts of money to satisfy their highly refined tourist needs' (Jovicic, 2016:608)
- a higher proportion of cultural tourists are within an occupation that is connected with culture, with one of the most frequent travel groups being DINKS (double income no kids).

These represent huge generalisations and tend to consider the cultural tourism market as an undifferentiated market (McKercher and du Cros, 2003), represented by a notion of a 'stereotypical cultural tourist'. This is neither representative of the diversity which exists within cultural tourist types nor useful for the sector trying to understand the cultural tourist market in order to target them more effectively through creative product development, effective messaging and meaningful partnerships within cultural destinations. As Jovicic (2016) reinforces:

> 'cultural tourism is not a single market, but rather a heterogeneous area extending from incidental encounters with cultural contents to travel caused by the clear intention to satisfy the specific cultural needs in certain destinations' (:610).

This is compounded by the difficulty of defining the cultural tourism product/offer/experience addressed in the previous section of the review. The huge variation in resources/attractions which can become part of a cultural tourism experience; - from festivals to hallmark events, to visits to the theatre, art galleries, museums, contemporary performing arts, - within a heritage or contemporary arts setting are *blurred* in the minds of the consumer as they

focus on the overall visitor experience. It is with this in mind that the following section will explore the motivations and drivers shaping the contemporary cultural tourism market.
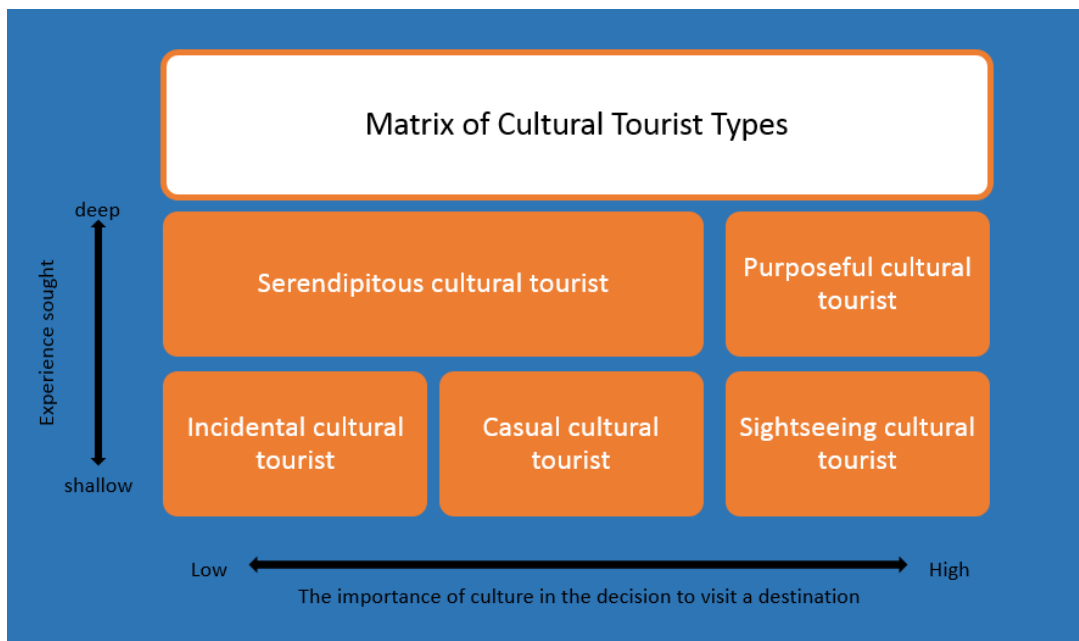
6.2.3   Motivations/drivers

At a most superficial level, the main motivation of cultural tourists has been cited as the drive 'to learn, discover and experience more about the destination visited' (Cetin and Bilgihan, 2016:140). Travel motivation is a critical factor in visitor behavior, especially in the case of destination choice. As such, attention needs to be paid to exploring the characteristics of cultural tourists in order to facilitate the cultural tourism experience and, as Kastenholz *et al* (2013) highlight, to increase the probability of repeat visitation and consumer loyalty. The concept of destination loyalty will be considered more fully in section 6.2.4 in its examination of cultural tourists and their experience of 'place'.

As cultural tourism has expanded and cultural consumption has become increasingly complex, a wide range of cultural tourism typologies have been developed to classify cultural tourists in terms of their motivations, interests and experiences sought or activities engaged in (Smith, 2016).

A strengthening theme running throughout various classifications of the cultural tourism market (Silberberg, 1995; Hughes, 2002 and McKercher and Du Cros, 2002, cited in Smith 2016) relates to the degree to which culture and cultural experiences are a core or peripheral motivation to visit a destination. The work of McKercher and Du Cros, (initially developed in McKercher, 2002), is particularly well cited within the literature and categorises cultural tourists according to how important culture is in the decision to visit a destination (level of engagement with culture) and the depth of experience sought (from shallow to deep). The resulting 'Matrix of cultural tourist types' (Figure 3) classifies 5 types of cultural tourist:

Figure 3 Matrix of Cultural Tourist Types

Source: McKercher (2002)

Table 3: Summary Characteristics of Cultural Tourist Types

Type of Cultural Tourist	Summary of Characteristics
Purposeful cultural tourist	**High centrality/deep experience** – where culture is a primary motivator for decision making and a deep cultural experience is sought. This represents a niche market. Mayor of London (2015) strategy describes them as '*highly motivated and early adopters*' (:26).
Sightseeing cultural tourist	**High centrality/ shallow experience** – culture is a key motivator but the type of experience sought is more entertainment-focused.
Casual cultural tourist	**Modest centrality/shallow experience** – culture plays a limited role in decision making and engagement with culture is superficial in nature. They are not necessarily superficial consumers of culture, but cultural activities provide experiences which satisfy the need for '*recreation, refreshment, replenishment*' (McKercher and Du Cros, 2003:55).
Incidental cultural tourist	**Low centrality/shallow experience** – cultural tourism plays little or no significant role in decision making but whilst at the destination they will participate in some form of cultural tourism activities, but at a superficial level. '*This type of tourist does not travel for culture, but does engage in some very light touch cultural experiences*' (Mayor of London, 2015:26).
Serendipitous cultural tourist	**Low centrality/deep experience** – cultural tourism plays little or no significant role in decision making, but whilst at the destination they participate in cultural tourism activities with the ultimate experience being considered deep and meaningful.

(Source: adapted from Mayor of London, 2015; McKercher, 2002; McKercher and Du Cros, 2003; Niemczyk, 2013; Smith, 2016)

Various testing of this classification of cultural tourist types has identified that:

- a spectrum of cultural tourist types exists – ranging from those who travel exclusively for cultural tourism activities to those who happen to participate in cultural activities/experiences to augment their trip experience (McKercher and du Cross, 2003)
- 'in most cases, the market is dominated by casual and incidental cultural tourists and that the purposeful segment is the smallest' (Du Cros and McKercher, 2015 cited in Smith, 2016: 35)
- 'the simple two-dimensional model proposed, in fact, reflects more profound underlying motives that shape the tourists' desired travel experiences as well as their cultural tourism behaviour' (McKercher and du Cros, 2003:55)
- 'physical distance, cultural distance, travel motivations and activity preferences all influence what type of cultural tourist an individual is. In turn, these factors shape the type of preferred experience sought' (McKercher and Du Cros, 2003:57).

The application of this model is evidenced in some recent industry/public sector strategies. For example, the *Cultural Tourism Vision for London 2015-2017, Take a Closer Look* (Mayor of London, 2015), makes direct reference to the model, stating that whilst *Serendipitous* and *Sightseeing cultural tourists* are the 'bedrock of London's visitor economy', a substantial growth in *purposeful cultural tourists* has been identified:

'A new generation of visitors who like to explore further, stay longer and spend more, whether they're visitors from overseas, the UK or London' (Mayor of London, 2015:26)

"I can have culture in America, I can have culture anywhere. What I really want to see is the distinct, unique, varied part that makes it different to everywhere else… what makes somewhere distinct" (USA serious considerer, VisitBritain's Leveraging our Heritage and Culture research 2014. Cited in Major of London, 2015:26).

Although this visitor profile needs to be understood within the context of the international visitor markets and the London cultural tourism product, the model is utilized to explore who the cultural tourists to London are.

Failte Ireland's (2012a) *New Strategy for Cultural Tourism in Ireland* categorises cultural tourism according to their depth of interest in culture; namely Motivated Cultural Tourists, Inspired Cultural Tourists and Incidental Cultural Tourists. Whilst there is a slight change in terminology the depth of interest is identified again as a key factor to differentiate between types of cultural tourists. The 'segmentation framework' which is subsequently set out in the strategy identifies key segments, their needs/preferences and opportunities for product 'bundles' (Failte Ireland, 2012a) or cultural tourism experiences using the terminology of this review. A few examples are set out below to demonstrate this approach:
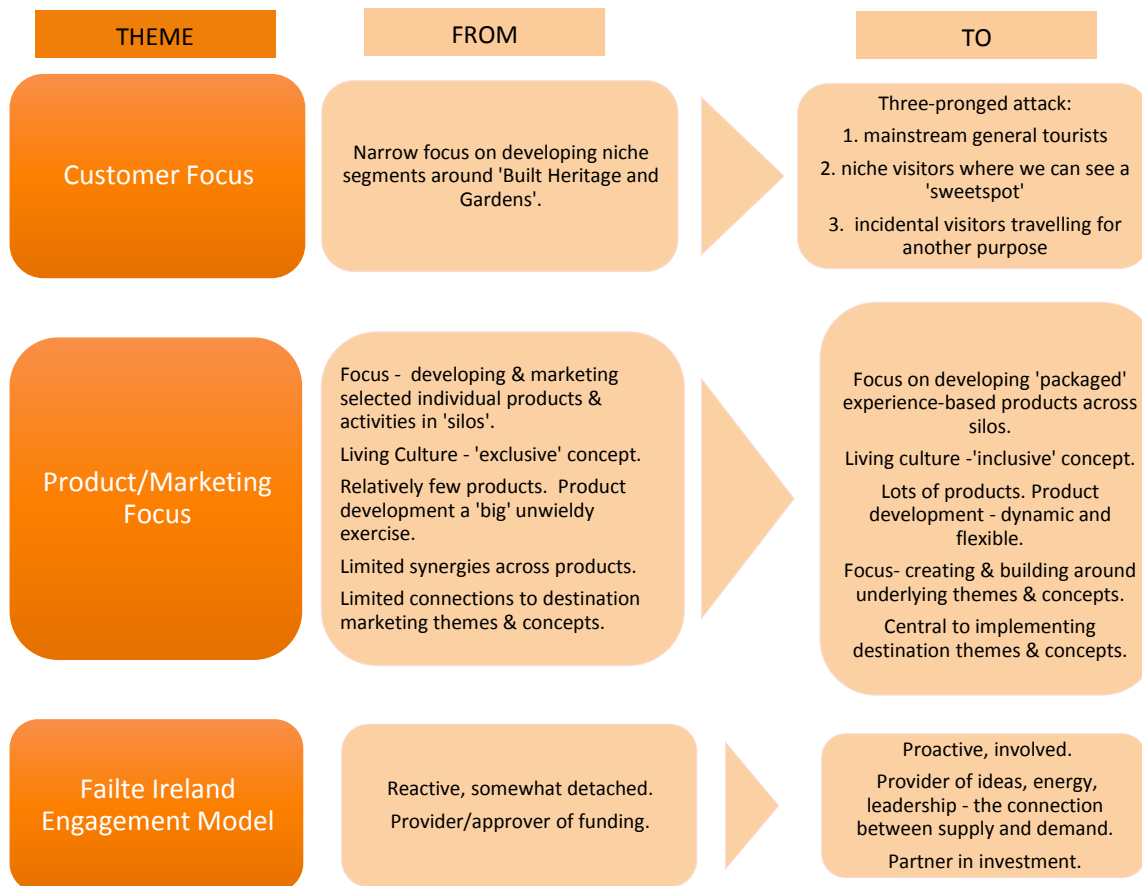
Table 4: Exemplar segments – segmentation framework (Failte Ireland, 2012a)

Motivated Cultural Tourists		
Target Segment	**Needs/Preferences**	**Opportunities for Bundles**
Gastro-Tourists (form of special interest independent Traveller).	Special access and depth of detail in their chosen area of expertise	High quality accommodation and restaurant options following themes such as the Winegeese Tour
Inspired Cultural Tourists		
Target Segment	**Needs/Preferences**	**Opportunities for Bundles**
The Independent couple or group of friends travelling by car to multiple regions.	Seeking a connection to the culture and people of Ireland in a broad sense. Variety of attractions and things to do.	Themed driving tours itineraries with a mix of activities at all budgets, e.g. Winegeese Tour, Famine Tour. Voucher system for attractions and accommodation. Non-pub nightlife.
Domestic family and couples	Seek new things to do in familiar places. High usage of cultural sites, gardens, events, etc. Smaller urban areas for weekends- e.g. Kilkenny , Westport.	Child Friendly/Family activities around a base. Provide rolling themes to encourage repeat visits to old favourites.
Incidental Cultural Tourists		
Target Segment	**Needs/Preferences**	**Opportunities for Bundles**
Social Adventurers- married without kids travelling to experience the country and its people.	They seek out local spots and want to understand the culture, through experiences such as music, sport, rural travel. Looking for sympathetic and authentic cultural interpretation.	Driving Tours. Voucher system for attractions and accommodation. Themed itineraries with accommodation in authentic locations. Excellent target for regional spread.

Source: adapted from Failte Ireland (2012a) - for complete segmentation framework see pages 34-38 in the Strategy.

What is particularly relevant to the context of this review is their explanation about how the *New Strategy for Cultural Tourism in Ireland* (Failte Ireland, 2012a) is different from previous approaches; set out in Figure 4 below:

Figure 4: How the Failte Ireland (2012a) Strategy has developed from previous approaches

THEME	FROM	TO
Customer Focus	Narrow focus on developing niche segments around 'Built Heritage and Gardens'.	Three-pronged attack: 1. mainstream general tourists 2. niche visitors where we can see a 'sweetspot' 3. incidental visitors travelling for another purpose
Product/Marketing Focus	Focus - developing & marketing selected individual products & activities in 'silos'. Living Culture - 'exclusive' concept. Relatively few products. Product development a 'big' unwieldy exercise. Limited synergies across products. Limited connections to destination marketing themes & concepts.	Focus on developing 'packaged' experience-based products across silos. Living culture -'inclusive' concept. Lots of products. Product development - dynamic and flexible. Focus- creating & building around underlying themes & concepts. Central to implementing destination themes & concepts.
Failte Ireland Engagement Model	Reactive, somewhat detached. Provider/approver of funding.	Proactive, involved. Provider of ideas, energy, leadership - the connection between supply and demand. Partner in investment.

(Source: Adapted from Failte Ireland, 2012a:23)

In establishing their strategic intent, they outline the importance of providing a framework within which they can:

- 'manage the evolving destination and product themes in a more coordinated way'; and
- 'provide a platform for improving the economic performance and sustainability of providers at all points in the system' (Failte Ireland, 2012a:22).

Some of these issues will be addressed in the organisational perspectives section of the review (Section 7). However, vital to the understanding of the cultural tourism consumer, is the way this framework highlights how an understanding of the full range of cultural tourism consumers (from purposive/motivated to the Incidental cultural tourists) allows a move from a narrow focused strategy - based on a *stereotypical* understanding of cultural tourists

- to a more comprehensive appreciation of the heterogeneity of cultural tourists and the variety of ways in which they engage with various parts of the cultural tourism offer whilst at a destination.

6.2.4   Cultural Tourists and the experience of place – Cultural Destinations

Given one of the overarching goals of the *Cultural Destinations Programme* is to 'enable arts and cultural organisations working in partnership with destination organisations to increase their reach, engagement and resilience through working with the tourism sector'[25], it is important to examine how a deeper understanding of the 'cultural tourist' can help to enhance destination loyalty and repeat visitation. In terms of sustainability and resilience a core of loyal visitors presents a 'most valuable asset, permitting repeated and stable economic benefits, the reduction of cost as well as the creation of 'stronger relationships' (Kastenholz et al, 2013:355). The ultimate goal of which is to create:

> 'a dynamic and sustainable tourist destination, valued, revisited, remembered and recommended amongst the demanding cultural tourist market' (Kastenholz et al, 2013:355).

This emphasises the importance of linking destination loyalty to a destination's competitiveness and long-term success, through nurturing positive and enduring relationships with key consumers. Making reference to the body of work of McKercher and Du Cros and their matrix of cultural tourist types, the study presented by Kastenholz et al (2013) concluded that destination loyalty was exhibited more by cultural tourists more aligned with the characteristics of the casual, incidental and serendipitous culture tourist types, where culture plays a secondary role. Whilst the authors call for a more comprehensive assessment of the results of the study, this is an important aspect to be explored within the context of the cultural tourist market to Kent. The consumer research to be developed as part of the Culture Kent Research Programme will incorporate aspects of repeat visitation, loyalty and recommendation to explore this further. If the cultural tourist types (casual, incidental and serendipitous cultural tourists) where culture is secondary are, in fact, easier to develop into loyal markets this represents an attractive proposition to the region. As their interest and engagement in cultural experiences is less central to their decision making, this could require a more varied cultural programme at the destination which is augmented by 'an appealing atmosphere of a lively and interesting place to visit, repeatedly attracting short break visitors mainly from the domestic and geographically closest markets' with more potential to develop loyalty and 'place attachment' (Kastenholz *et al*, 2013:354). This links into the previous discussion of the trends influencing cultural tourism related to the recognition of the experience economy and the move towards the more intangible qualities of image, lifestyle and atmosphere (Jovicic, 2016) which necessitates a co-creation of tourist experiences through increasing relationships with consumers. This, supports the need for those organisations facilitating the development of cultural destinations to consider not just the tangible cultural offer, but the 'living environment' as an attractive asset to attract repeat visitors.

Furthermore, the study also found that domestic rather than international visitors are more loyal, making the link to ease of access to the destination, but also the likelihood that they may be part of the VFR (visiting friends and family) market. Given the rising significance of the VFR market to domestic tourism, highlighted in section 4.3.1, this supports the contention that the consumer research into cultural tourism in Kent, as part of this study, should not eliminate local Kent residents from the sample. As Kastenholz *et al's* (2013) study concludes 'for a tourist destination with cultural appeal, this may suggest that domestic independent travelers may be an interesting target market to cater for' (354).

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[25] www.artscouncil.org.uk

6.3 SUMMARY

Trends in consumer behaviour highlight that there has been a shift in cultural tourism from seeing to experiencing, as such making the relationship between the cultural tourism provider and the consumer more critical to achieving differentiation and the creation of an authentic sense of place. The cultural tourist market is heterogeneous and attention needs to be paid to the degree to which culture is core or peripheral in terms of their motivation and depth of cultural experience sought. Understanding how consumers view themselves has important implications for the way in which culture and the arts are reflected in marketing communications.

Dance Workshop (Photo Jason Pay), courtesy of Canterbury Culture

7 ORGANISATIONAL PERSPECTIVES

7.1 INTRODUCTION

Changes in the policy and funding environment for culture and the arts in the UK have placed new emphasis on finding ways to generate sources of income for the sector beyond public subsidy, and on the importance of collaborative partnerships as a means of achieving this. The cultural and creative industries are viewed as having a major contribution to make to commercial activities such as cultural tourism, to innovation and to place-branding, as well as to broader social and economic goals in the areas of wellbeing, education, diversity, community resilience, sense of place, and the international profile and 'soft power' of the UK (DCMS, 2016). However, despite the considerable weight of expectation on the sector – encouraged, it has been argued, by 'significant boosterism from local to national policy' (Fleming, 2015:16) – there is no clear consensus regarding the mechanisms for achieving collaboration along the value chain. Even though research by King's College, (*Cultural Enquiry into partnerships*) authored by Ellison (2015), found that multiple partnerships are now a fact of life for UK cultural organisations of all sizes:

> '… there is a lack of coherence in how it is used and what is understood by it. The sector does not have its own definition or set models. 'Partnership' we found to be an umbrella term, encompassing a wide range of collaborations at national, regional and local level' (Ellison, 2015:3).

Models such as 'cultural ecology' or 'eco-system' (Warwick Commission, 2015) and 'cultural and creative spillovers' (Fleming, 2015), which are widely used to capture the 'flows' by which benefits are spread between sectors and to the wider society, often focus on macro effects at national, regional or local level, rather than on the level of the organisation or the organisational interactions which are critical agents in the production of these effects. This is a gap that is addressed by the Culture Kent Research Programme and has been built into the participatory approach to the organisational perspectives research.

This section of the Evidence Review, therefore, focuses on the organisational dimension of partnership and collaboration, and considers not only sector-specific policy documents, commissioned studies and reports produced by government and university departments and regional and national agencies, but also more generic organisational and management research on the dynamics of partnership and collaboration. The evidence is organised under four topic headings in answer to the questions:

(1) How do cultural/arts organisations view their relationship with the tourism/visitor economy and vice-versa?
(2) What are the opportunities for cross-sectoral work between tourism and culture/arts?
(3) How can cross-sectoral partnerships improve the resilience and reach of arts/cultural organisations?
(4) What are the barriers and challenges to cross-sectoral working, and how do they impact upon organisations' abilities and willingness to collaborate?

7.2 HOW DO CULTURAL/ARTS ORGANISATIONS VIEW THEIR RELATIONSHIP WITH THE TOURISM/VISITOR ECONOMY AND VICE-VERSA?

The evidence from the literature is that cultural and arts organisations are convinced by the 'cultural ecology' or 'cultural eco-system' concept, and of the need play a part in a thriving ecology in order for culture and the arts to survive and succeed. According to the *Warwick Commission Report*,

> 'The Ecosystem describes the interconnectedness of the Cultural and Creative Industries in terms of the flow of ideas, talent and investment from public and private sources that characterises them. Many creative

organisations are small business-to-business operations feeding the needs of other organisations within the Cultural and Creative Industries and dependent on the success of the Ecosystem as an integrated whole to survive and flourish …The flow between the commercial and cultural ends of the Ecosystem generates economic value, audiences and consumers' (Warwick Commission, 2015:21).

Although the Report acknowledges the need for a joined-up, multi-agency approach to culture, heritage and creativity, the main motivations of arts and cultural organisations – artistic impact, growing the audience, and, linked to this, social/community impact and education –tend, unsurprisingly, to be internally focused. This will be explored further in the subsequent research, using both an online survey and semi-structured interviews with a range of organisations across the tourism – culture/arts continuum within Kent.

Arts and cultural organisations are reportedly frequently suspicious or dismissive of the drive to form partnerships or alliances, regarding them as 'imposed' or 'window dressing' (Ellison, 2015:3). Most partnerships and collaborations are formed with other arts or cultural organisations. Of the 35% of partnerships reported to King's College with organisations outside the cultural sector, these were primarily with non-commercial and public sector institutions such as local authorities, higher education, health, or the prison service. There were no reported examples in the King's College research of commercial partnerships consisting of 'an agreement between a cultural sector and commercial organisation **where the driver is commercial**' (Ellison, 2015:15 – *emphasis added*).

With regard to tourism specifically, it can be said that, whilst many arts and cultural organisations endorse the 'sense of place' agenda, this is usually expressed in terms of building community resilience and local attachment to place, rather than destination branding or creating 'products' for visitors. The case of the Greenwich Maritime Marketing Group, which is a collaboration between the marketing managers of Greenwich Theatre and the National Maritime Museum with the London Borough of Greenwich's Head of Tourism, is an early exception. Formed as a joint partnership in 1997, when the area became a UNESCO World Heritage Site, the consortium was established 'to make the best use of a shared budget to attract visitors to the area' (Beer et al, 2010:1). The Greenwich Maritime Marketing Group is unusual, both in its focus on Greenwich as a destination, and in that the main stated aim of the alliance was to reduce transaction costs – an aim which generally ranks low in the list of motivations for cultural/arts organisations to engage in partnerships (Hager and Sunger, 2012; Ellison, 2015).[26] Significantly, however, the Group does not contain a private sector partner.

Some of the tensions inherent in the relationship between culture/arts and tourism are revealed in Dame Fiona Reynolds' account of the culture change and restructuring she spearheaded at the National Trust during her time as Director General. The new emphasis on the visitor experience and on the National Trust's role in 'connecting people with places' was regarded by many in the organisation as a dilution of the core mission of cultural conservation and dismissed as a kind of *Disneyfication*. Bringing the National Trust into the visitor economy without compromising cultural quality and standards and alienating the organisation's cultural experts was a long and difficult process:

> 'I had to be very clear that the National Trust is about connecting people with places. We needed to be less egocentric as an organisation and we wanted people to see the Trust not as the end but as the means, the facilitator, enabling people to enjoy and love and share in special places. To do this, we had to have two important pieces of knowledge. Firstly, we needed to know what it was that made our places special in order to do the conservation work. Secondly, we needed a really good understanding of people and a much deeper and warmer relationship with them. The whole process started with people and with looking at ourselves with their eyes'. (Reynolds, 2012:2)

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[26] According to the King's College research, value for money is rarely the main motivator for arts and cultural organisations to form partnerships. The opportunity to engage broader audiences is usually the key motivator (Ellison, 2015).

The process resulted in services being redesigned and restructured, and building visitor engagement capacity, to enable staff to cope with the different sets of demands.

Unlike the case of the Greenwich Maritime Marketing Group, the National Trust, as a large scale, mass membership organisation, did not have to form a cross-sectoral alliance in order to embrace the 'visitor economy', but had to undergo a major internal reorientation to align itself culturally and organisationally with its newly emphasised 'public engagement' mission. The changes in the National Trust are, in a sense, recognition of the status of cultural heritage sites as 'destinations' in their own right, although the extent to which such sites may regard themselves as embedded in a wider destination or visitor economy is unclear.

Another category of organisation for whom the sense of place is strongly rooted in the idea of a visitor economy is that of the 'regeneration' focused organisation, including 'flagship' cultural institutions such as the Turner Contemporary. These create a cultural brand for a destination, stimulate visitation, increase footfall to other businesses in the destination, and act as a hub and springboard for other networks and activities. The Turner Contemporary has engaged further and more directly with the tourism economy with an initiative 'to apply its skills and experience to help increase innovation and productivity of the cultural tourism and hospitality industry in Margate' (South East Creative Economy Network, 2016: 24). The South East Local Enterprise Partnership highlights a number of high profile arts and culture organisations immersed in the regional visitor economy through their cultural regeneration remit. In addition to Turner Contemporary, these include:

- Creative Foundation – festival programming, venues, and developing the infrastructure for creative clusters
- The *Coastal Cultural Trail*, an example of tourism product development and marketing. The trail links the Towner Gallery in Eastbourne, De La Warr Pavilion in Bexhill, and Jerwood Gallery in Hastings. 'The trail offer is part of a short break experience, and includes cycling, walking, overnight accommodation, food and drink' (South East Creative Economy Network, 2016: 12).

The picture with regard to the relationship between arts and culture organisations and tourism is, therefore, mixed. Whilst it is evident that the two sectors share a number of interests, particularly with regard to the growing of audiences and creating a sense of place, the mechanisms for identifying and achieving these commonalities of interest are unclear. The 'multi-sectoral' nature of both the arts and cultural industries on the one hand, and tourism on the other, add to the difficulty, where goals are often articulated in very different ways- for example, community resilience and local attachment to place for culture/arts and destination branding and creating products for visitors in more of a tourism context. Both are also composed of predominantly small and micro-scale organisations, whilst in addition the tourism sector contains both public and private sector actors with a more commercially driven agenda. The next section considers how the various interests of these heterogeneous sectors might come together in recognising opportunities for cross-sectoral collaboration.

7.3 WHAT ARE THE OPPORTUNITIES FOR CROSS-SECTORAL WORK BETWEEN TOURISM AND CULTURE/ARTS?

Collaborations require a catalyst – the recognition of a shared goal and vision, and of an opportunity to realise that goal. This section of the review starts by exploring the enabling environment that is being put in place to encourage and support organisations in recognising and exploiting opportunities, and which is an important catalyst in initiating partnerships, and then goes on to consider the nature and scope of partnership working in the tourism and cultural sectors.

Catalysts: Responding to funding opportunities is an important stimulus to developing partnerships. The research by King's College Cultural Enquiry (Ellison, 2015) revealed:

> '… cases where initiatives run by funders were the springboard for a partnership project, and also where a project or programme that was independently started would not have happened if it had not been responding to a funding brief' (:17).

EU funding has been prioritising creative collaborations as a means of stimulating cross-sectoral spillover benefits, introducing a new growth phase for 'spillover-related projects', driven by programmes such as the European Capital of Culture, Interreg Europe and URBACT. Creative SpIN (Creative Spillovers for Innovation) is one such URBACT project, aimed at

> … setting up tools and methods to trigger innovation and creativity in businesses and other kinds of public and private organisations: 'The purpose is to encourage interactions between [Cultural and Creative Industries] and other economic and social sectors, from manufacturing, ICT and tourism to health and the public sector' (Fleming, 2015: 17).

Aims and modalities of partnership working: The idea underlying these initiatives is that the operational interests of organisations lie in creating collaborations that will produce wider strategic benefits at the macro level in the form of various types of spillover effect. These are classified by the '*Cultural and Creative Spillovers in Europe'* report (Fleming, 2015) as:

> *'Knowledge spillovers:* new ideas, innovations and processes developed within arts organisations and by artists and creative businesses which spill over into the wider economy without directly rewarding those who created them.
> *Industry spillovers:* vertical value chain and horizontal cross sector benefits to the economy and society in terms of productivity and innovation that stem from the influence of a dynamic creative industry, businesses, artists, arts organisations or artistic events.
> *Network spillovers:* impacts and outcomes to the economy and society that spill over from the presence of a high density of arts and/or creative industries in a specific location (such as a cluster or cultural quarter). The effects seen in these are those associated with clustering (such as the spread of tacit knowledge) and agglomeration, and the benefits are particularly wide, including economic growth and regional attractiveness and identity. Negative outcomes are also common – e.g. exclusive gentrification' (:8).

In order to achieve these spillover effects, *complementary* alliances may be forged to overcome perceived limitations or constraints, or *supplementary* alliances in order to magnify the strengths of the partnering organisations (Iyer, 2003).

The King's College (Ellison, 2015) research on *The Art of Partnering* identifies three major alliance modalities:

- *goal-oriented* – in response to a funding opportunity (including consortia getting together for the purpose of bidding for funding); usually come together for one-off project or programme delivery;
- *resource-based* – complementing/supplementing capacity; reducing transaction costs, increasing value for money and enabling economies of scale; and
- *network-based* – loose group of organisations (including local, regional, national or international hubs) to make contacts, share information, and to discuss shared aims and funding opportunities (*see Taxonomy of relationships,* Ellison, 2015:15).

These broadly align with the motivations for entering into collaboration identified by Hager and Sunger (2012) in the context of arts organisations working with Destination Management Organisations in the USA:

- *Strategy* – including the desire to expand markets and develop products
- *Efficiency* – based on a desire to economise on transaction costs
- *Learning* – a desire to expand capabilities and broaden the organisational knowledge base (Hager and Sunger, 2012).

Opportunities for partnership working: In the case of cross-sectoral collaborations, the cultural industries are seen as key for shaping and meeting the demands of the growing 'experience economy', and for pioneering innovative forms of governance and ways of working, as well as innovative products and approaches to the market. In the context of the European City of Culture Programme, arts and cultural organisations are credited with having introduced new approaches to working with stakeholders and new technology, and more flexible methods and structures (Fleming, 2015).[27] However, radically different organisational cultures can also be seen as an obstacle to partnership working (see section 7.5, below). Several reports highlight the potential of innovative digital platforms and new technology as a means both of delivering and mediating experiences, and for conducting consumer analysis to get a better understanding of the consumer/visitor experience, whilst noting that collaborations to develop such digital capacity are currently thin on the ground.

Specific examples of collaboration between the tourism and arts/cultural sectors include:

(1) *Product development and delivery*: reference has already been made (above) to the *Coastal Cultural Trail* linking the Towner Gallery in Eastbourne, De La Warr Pavilion in Bexhill, and Jerwood Gallery in Hastings. Hager and Sunger (2012) also note arts organisations working with local Destination Management Organisations in the USA were active in developing and delivering cultural tourism products such as studio tours, festivals and other events.

(2) *Marketing*: in Hager and Sunger's (2012) study, the most common destination management action employed by local arts agencies was marketing cultural products to prospective audiences: producing/distributing brochures and public art guides, maintaining informative websites, radio advertising, road signage and interpretative signage. See also the case of the Greenwich Maritime Marketing Group, referred to in the previous section.

(3) *Policy and planning*: the 'creative milieu' effect is 'perhaps the most reported of all cultural and creative spillovers' (Fleming, 2015:41). Its impact on cultural destinations may be planned or incidental:

> 'Creative entrepreneurs – often in their start-up phase – are looking for low-cost working spaces. Perhaps these cultural entrepreneurs do not make much money. Yet they create interesting activities, organise events, exhibitions, they attract people to an area, build social networks, exchange new and innovative ideas. And they do not mind adopting 'bohemian lifestyles'. They treasure places that are "different", with a specific cultural identity' (Fleming, 2015:41).

The growing reputation of Hastings as a 'cultural hotspot' is credited with stimulating a 'culture-led regeneration' in the town, which has seen increasing inward migration of creative professionals, especially from London and Brighton. The ambitious White Rock development, between Hastings and St Leonards, spins off from the success of Hastings as a cultural destination, and is intended to '[build] on the momentum generated by all these initiatives to ensure maximisation of the economic and social benefits of this cultural renaissance' (South East Creative Economy Network, 2016:16). The South East Creative Economy Network, (2016) prospectus calls for '**planned collaboration between the creative, housing and development sectors, together with local authorities**', to come up with 'imaginative solutions to place making' [emphasis

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[27] Particularly in the cases of Liverpool and the Ruhr.

added] (South East Creative Economy Network, 2016:13). The cultural and creative sector thus has an important contribution to make to policy and planning, yet, as Hager and Sunger (2012) note, planning is an under-recognised function in collaborations between the tourism and arts/cultural sectors.

7.4 How can cross-sectoral partnerships improve the resilience and reach of arts/cultural organisations?

Much of the literature under review emphasises the benefits to other sector organisations of collaboration with arts and cultural organisations. Their contribution is understood not only in terms of brand impact, and the innovative ideas they can bring to functions such as product development and delivery and marketing, but also in terms of improved organisational resilience[28] from exposure to new forms of organisation and ways of working, transforming hierarchical and market oriented practices with the 'adhocracy' characteristic of arts and cultural organisations.[29] However, arts and cultural organisations are themselves not immune to the pressures of the challenging and rapidly changing economic and political climate. Whilst, according to Graham Leicester's provocative 2007 think piece on cultural leadership, 'creative adhocracies' are suited to a 'complex operating environment', they are also 'fragile and dangerous – only the fittest survive' (Leicester, 2007:3). Quoting Charles Leadbetter, Leicester argues: '" Sweat equity, natural talent and tenacity", being "fleet of foot" with a "resilient entrepreneurial outlook" are no longer enough. Participants also need to develop greater capacity for strategy, management and leadership' (Leicester, 2007:6).

The arts and cultural sector, with its predominantly SME structure, faces particular challenges, one of which is the wide dispersal of creative businesses. According to the South East Creative Economy Network (2016) prospectus:

'Many operate in isolation and find it difficult to access finance or lack dedicated, affordable workspace. Business isolation creates a lack of awareness about local expertise. Being unable to collaborate with other businesses or share areas of good practice and expertise is a hindrance. This factor needs addressing when looking at the development of economies of scale'. (:6)

In addition to the problems of isolation, many cultural and creative businesses suffer from a lack of HR and training capacity:

'The vast majority of creative businesses (94%) [have] neither an internal training budget nor any record of accessing external training funds (89%). Small businesses [have] less time and money to train staff, and portfolio working, seasonal productions and contract-based work [make] it difficult to offer anything more than ad hoc, on-the-job training'. (South East Creative Economy Network, 2016: 9)

According to the Warwick Commission, increasing reliance is being placed on the cultural and creative sector to deliver a range of social, cultural and economic benefits, but scaling up these effects requires that the sector be supported through investment and support to achieve diversity, enable risk taking, develop education and skills, increase participation in the digital revolution, and facilitate R&D and the growing of audiences and public

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[28] 'Organisational resilience' refers to 'a business's ability to adapt and evolve as the global market is evolving, to respond to short term shocks—be they natural disasters or significant changes in market dynamics—and to shape itself to respond to long term challenges.'   C.f. http://www.organisationalresilience.gov.au

[29] Organisations with an adhocracy culture are characterised by adopting 'organic processes' and by their emphasis on creativity, innovativeness and risk taking (17).

engagement.   Within the context of the Culture Kent Project (and the *wider Cultural Destinations Programme*) it is important to examine the extent to which tourism and the wider visitor economy provide a vehicle for working towards achieving some of these goals.   The Warwick Commission report argues strongly that:

> 'Cultural organisations need to do a better job at coming together locally to share resources, devise partnerships that will unlock financial savings and generate income benefits, and join forces in making their case … They should invest time, effort and self-criticism in a deeper understanding of the economic, social and environmental challenges facing their local communities so they are able to make an intelligent and realistic arts-based contribution to solving those problems' (Warwick Commission, 2015:16).

This leads to three key questions:

1. whether the focus on 'place' is central to achieving this?
2. whether an increasing link to tourism and visitor economy can help cultural organisations become more resilient? and
3. what are the mechanisms through which this can best be achieved?

Network-based collaborations are one approach to building this kind of alliance. Initiatives such as the South East Creative Economy Network aim to connect businesses with potential partners, investors, business support services and peer-to-peer knowledge exchange networks (South East Creative Economy Network, 2016). *Goal-oriented* and *resource-based collaborations* enable the sharing of capacity to either fill in the gaps of organisational and capacity limitations or magnify the effects of common strengths. Examples of such collaborations have been examined previously in this review. However, the effectiveness of such collaborations in increasing organisational resilience has been found to depend largely on the *durability* of the relationships established.   One-off goal-oriented collaborations, for example establish fragile, temporary relationships with fewer and less far-reaching effects (Smith and Wohlstetter, 2006).

Hager and Sunger (2012) found that more than 33% of their sample of arts agencies collaborating in local Destination Management Organisations in the USA reported 'an expansion of capabilities stemming from partnerships with other community organizations engaged in local cultural tourism development' (:405). Much of this expansion is attributed to the opportunity to learn from the experience of working together over a sustained period. Most striking were specific references by participating organisations to opportunities to become involved in

> … 'cultural planning, or broad regional planning that involved the arts, in their cultural tourism development efforts. We include this under the learning orientation because it involves the collection of information and diverse perspectives in long-term planning for the community' (Hager and Sunger, 2012: 405).

Involvement in what Hanger and Sunger (2012) describe as the 'under-recognised' planning function enables the arts and cultural sector to participate in the cultural eco-system higher up the value chain, where resource decisions are made, and to benefit from knowledge and experience from other sectors. Such activities also open up avenues to developing significant personal relationships and collaborations that can play a key role in extending organisational resilience through the exchange of knowledge and expertise, and possibly opening access to wider networks and resources. To quote Hager and Sunger's research again:

> 'Local arts agencies often described interlocking directorates, where their leaders sat on tourism councils, or where tourism leaders sat on arts agency boards or committees. **These relationships create tight bonds between the arts councils and tourism development, contributing to learning on both sides'** [emphasis added] (Hager and Sunger, 2012: 408).

The Warwick Commission recognised the importance of embedding this kind of collaboration into the governance of arts and cultural sector organisations, with its recommendation that all publicly funded Cultural and Creative Industries organisations should have a member with expertise in education and skills training on their boards, adding: 'It is essential that strong leadership in these areas informs and guides decisions made at the highest levels' (Warwick Commission, 2015:49).

7.5 WHAT ARE THE BARRIERS AND CHALLENGES TO CROSS-SECTORAL WORKING, AND HOW DO THEY IMPACT UPON ORGANISATIONS' ABILITIES AND WILLINGNESS TO COLLABORATE?

Assessing the barriers to successful cross-sectoral collaboration is hampered by lack of clarity as to what actually constitutes successful collaboration, and by the lack of objective evaluation. The King's College research (Ellison, 2015) uses a simple definition of partnership taken from the Partnership Brokers Association, which emphasises the following features:

- ongoing working relationship where risks and benefits are shared
- equity
- transparency
- mutual benefits.

97% of partnerships surveyed by King's were reported as successful (although this may mean that the sample is skewed in favour of self-reported success), but the definition of reported success varied throughout the sample (e.g. from value for money to producing a project or output to more generally 'enhancing the work of the organisation'). Moreover, only 57% of the sample had actually carried out an evaluation of the partnership. 'Evaluation is often considered too difficult and gets neglected or reduced to highly subjective judgements' (Ellison, 2015:29).

One of the most commonly reported barriers to collaboration is the perception of **difference**. Organisations outside the sector – such as local authorities – may be perceived as speaking 'an entirely different language':

> For many organisations, the Local Authority is not seen as relevant to them – it may not own their building, give them any funding, or engage in their work; but it will almost certainly be doing one of those things for a co-producing partner, receiving venue, or individual artist … **The problem with talking to Local Authorities is that they speak an entirely different language**, and it isn't always 'about the money, stupid'. More often than not it is about a sense of place, community and well-being. Local Councillors look directly at their own wards and communities and ask what an arts organisation is doing for them [emphasis added]. [30]

The message here is that it is possible to identify common goals and visions beyond the problems of differing terminology. However, to facilitate collaborative working, Culture Kent, which has partnerships at its core, has to understand if there are *perceptions of difference* and if so, whether these are sectoral or related to another potential area of division; for example, location or hierarchy of planning and strategic thinking about the region. Only through understanding the types of barriers or challenges from the perspective of the organisations themselves can Culture Kent help to facilitate new or improved strategic relationships between tourism and cultural organisations in Kent.

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[30] Mary Swan 'Local Authorities: Time to Look After the Ecology' 2/11/2015 http://www.whatnextculture.co.uk/local-authorities-time-to-look-after-the-ecology/ accessed 19/7/2016

These barriers will be explored in the Culture Kent Research Programme via the online survey and semi-structured interviews.

Although there is heavy emphasis in the literature on the importance of sharing common goals, direction and vision, the notion of **complementarity** in partnerships implies strength to be derived from certain kinds of difference, for example in areas of competence, capacity, knowledge or resources (Iyer, 2003). Harnessing the power of these differences means developing a clear understanding of the roles and strengths of the collaborating partners, and of the potential pitfalls of collaboration, and how to avoid them. Here, there are two basic issues to be agreed:

(1) the 'rules' on which the union rests, i.e. what governs the proposed relationship; and
(2) the 'nature' of the partner, i.e. what is the makeup of each individual organisation (Iyer, 2003).

Differing expectations and benefits may not be an obstacle where these are clearly articulated, understood, and agreed. Key learning points from a study of nine collaborations between higher education institutes and museums, galleries and the visual arts in the north west of England included the following, in relation to the setting of objectives:

- …'time should be taken at the beginning of a new partnership (or even a new project within a partnership) to ensure that everyone fully understands the operational and strategic needs of the other. They do not have to be the same for the project/partnership to be successful'
- 'Shared aspirations/objectives… may evolve and change over time, but to be successful any collaborative work must achieve more than the partners could have achieved alone'
- 'Planning should include the development of risk assessments. These should incorporate issues around decision making and capacity' (Dawson and Gilmore, 2009:4).

Understanding the strengths and limitations of partners may be more difficult where the partnering organisations are very different in terms of scale (e.g. national versus local) or organisational culture. In some cases, responsibility for the success of the partnership may be left to those who are too senior or too busy to be able to dedicate the proper amount of time to it, or to junior members of staff with no authority to make decisions. Difficulties may also arise when partners are constrained by very different operational parameters – e.g. the electoral cycles of local authorities:

… 'by the time you reach a decision, your partners have changed or might not even exist anymore…. Local elections can change the whole funding environment and many years of development can be gone. It can be disastrous for certain projects' (Ellison, 2015:18).

Partners sometimes fail to take proper account of their own limitations, in terms of the actual costs imposed by partnership working:

'Concerns about the cost of partnerships emerged from the interviews and roundtables, and one case study found that the partnership had actually increased its expenditure. One cost reported several times was the need to fund the project managers, brokers or coordinators. Paradoxically, taking time for engagement and relationship building' – [considered] essential to scoping successful partnerships – 'could also make them vulnerable' (Ellison, 2015:18).

Structured opportunities for communication and the coordination of activities are regarded as crucial for building understanding and trust (Petrova and Hristov, 2016), which may in turn 'lead to future projects and long-term collaboration' (Ellison, 2015:20). A number of cases highlight the importance of having a 'designated liaison officer

to identify and communicate the potential for research, projects and partnership in language which […] partners can understand' (Dawson and Gilmore, 2009:4).

The focus on organisations may obscure the important role of individuals in making a partnership collaboration work. Dawson and Gilmore (2009) note that

'While having strategic agreements (such as a Memorandum of Understanding) in place may provide a helpful context for partnership working … success will depend on individuals with shared interests and passions who want to work together' (:4).

Likewise, the King's College research notes that 'Relationships between people are at the core of partnerships' (Harkness C, National Museums Northern Ireland, quoted in Ellison, 2015:29).

The experiences emerging from the evidence underscore the importance of knowledge and communication for successful collaborations. The *Cultural and Creative Spillovers in Europe* report (Fleming, 2015) points to the need to develop:

'… hybrid and cross-sector spaces and places which allow for structured and unstructured knowledge transfer between the arts, cultural and creative industries, and wider business, social and technological sectors' (:11)

Some of these spaces are emerging in the concept of creative economy networks and hubs, and in digital spaces such as *What Next?* [31] and *The Culture Diary*[32]. However, the King's College research also highlights the importance of the human dimension – building relationships, working practices, and communication, suggesting that 'brokering partnerships is evolving as a new role, with leadership attributes that need embedding within organisations' (Ellison, 2015:3).

7.6 SUMMARY

This Evidence Review has found plentiful references to key models such as cultural ecology and creative spillovers, which explain the flows and benefits between sectors and to the wider society, but it has identified a gap in the understanding of these relationships and processes at the level of individual organisations. The participatory research carried out as part of the Culture Kent Research Programme puts individual organisational perspectives at its heart. The results and interpretation of the findings from both the online survey and the semi-structured interviews and reflective conversations will provide a sound basis from which Culture Kent can better understand how organisations perceive the opportunities and barriers related to cross-sectoral working.

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[31] www.whatnextculture.co.uk
[32] http://www.theculturediary.com

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Tango on the Terrace, Turner Contemporary (photo Jess Limbrick), courtesy of Turner Contemporary

Further reports from the Culture Kent Research Programme:
Report 1: Audit of the Cultural Tourism Landscape – Part II
Report 2- Organisational Perspectives.
Report 3- Consumer Perspectives.
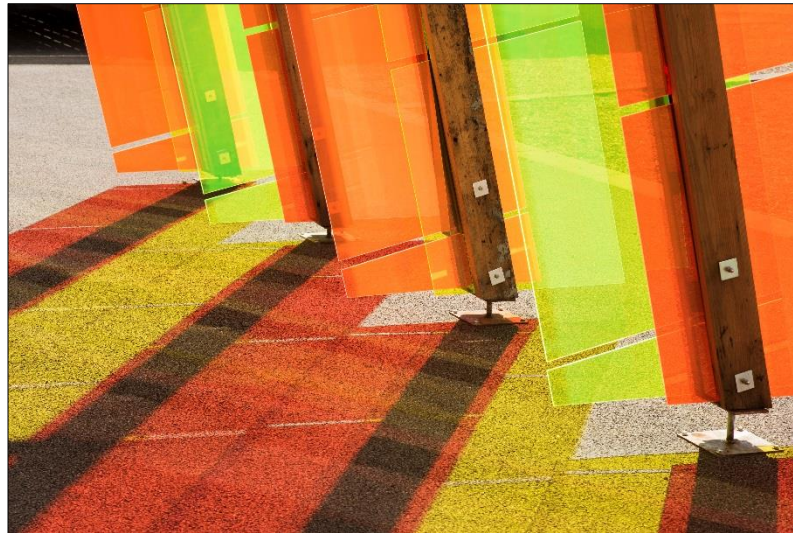Culture Kent Research Programme – Summary of Findings Report.

Supporting documents also produced by the Culture Kent Research Programme:
Culture Kent Pilot Project Case Studies 1-6
Best Practice for Building Cultural Destinations
Legacy and Ways Forward for Cultural Tourism in Kent
Research Insights 1-3.

Dutch/Light by Jyll Bradley (photo Thierry Bal). Image courtesy of Historic Dockyard, Chatham

The Culture Kent Research Programme has been undertaken by the Tourism and Events Research Hub, Canterbury Christ Church University and Visit Kent.

The Tourism and Events Research Hub at Canterbury Christ Church University aims to provide a clearly defined research and knowledge exchange offer to the visitor economy. It brings together a team of researchers with areas of expertise ranging from tourism, culture and the arts, to stakeholder analysis and destination management and marketing, to collaborate on research and consultancy projects.

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Contact: Dr Karen Thomas, Director of the Tourism and Events Research Hub.

Visit Kent is the official Destination Management Organisation (DMO) for the county. Visit Kent provides a not-for-profit consultancy and delivery service, through Go to Places, that supports clients whose aims and objectives are deemed to lie within the core interests of Visit Kent and the wider visitor economy. Visit Kent has extensive experience in providing support to the Kent Visitor Economy, championing the county's £3.6 billion tourism industry and supporting 72,000 jobs.

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