Report on the results of surveys for tourists, residents and entrepreneurs in the case studies

Purpose and scope of the deliverable

Work Package 1 is mainly concerned with documenting the case study areas of the 15 SPOT partners by developing quantitative and qualitative indicators at national, regional and local levels which are appropriate for understanding the role of cultural tourism.

This is a report on three surveys conducted within the scope of the SPOT project. The purpose of this deliverable is to provide the results of the surveys for tourists, residents and entrepreneurs, and provide an analysis and discussion comparing the results of the fifteen participating case studies. The aim is to find out more about the similarities and differences that exist in tourists', residents' and entrepreneurs' experiences and views on cultural tourism and about the potentials of cultural tourism.

Document history

Version	Date	Description
0.1	*18 June 2021*	*Concept chapter resident survey results*
0.2	*2 July 2021*	*Concept chapter tourist survey results*
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Content

Summary

Introduction

This is a report on the results of surveys collected for fifteen case studies in the context of the SPOT project, funded by the European Commission within the framework programme Horizon 2020. The goal of the SPOT project is to develop a new approach to understand and address cultural tourism and to promote sustainable development of cultural tourism in both disadvantaged and privileged areas. The concept of cultural tourism is changing from a more traditional form (focusing on museums, art galleries and such) towards people seeking to experience culture rather than observing it. These trends provide opportunities to both revitalize poorer and rural areas through economic and social development while protecting local culture and landscape.

Surveys can offer a quantitative understanding of the meaning and importance of cultural tourism for the regions involved. This involves collecting data from key informants in the case studies like tourists, residents and tourism or culture related entrepreneurs as important target groups. The main objective of this research is to describe and analyse information of tourists' experiences and the views of residents and tourism entrepreneurs on the current situation and future potential of cultural tourism, in order to compare different case study areas individually or as part of a cluster (under- or over-touristed, deindustrialised, urban and/or rural, remote peripheral or central). As surveys were mostly conducted within the first year of the COVID-19 pandemic, the influence of the pandemic was taken into account throughout the process.

The three surveys for tourists, residents and entrepreneurs were developed by the WP 1 team, in cooperation with all SPOT partners. The surveys used primarily closed (multiple choice) questions to enable easy processing. It was decided, mostly due to difficulties arising as a consequence of the COVID-19 pandemic, that the target number of respondents per survey would be 40, and that teams had the freedom to decide what method of sampling was best for their specific case study. Most surveys were conducted during the months of July 2020 to February 2021. After the fieldwork period, almost 1000 tourists, over 1700 residents and over 900 businesses were surveyed, although sample sizes varied largely between case studies. Survey data from all teams was collected via a data template specified by the WP 1 team, and subsequently combined into one Excel file per survey. Graphs and tables were created where appropriate and the results comparing the case studies are described in this summarizing report.

Evidence and analysis

From this research on the views and experiences of tourists, residents and entrepreneurs the following findings can be presented:

- According to tourists, residents and entrepreneurs transport infrastructure is important, and has a lot of potential for improvement.

- Both tourists and entrepreneurs often feel there is not enough information and communication provided towards tourists.

- Most residents see the economic benefits of cultural tourism. They can profit from an increased job offer, or by selling products and services. Improving facilities for tourism can also improve quality of life for residents. However, with increasing tourist numbers, residents should not be forgotten as they will have a different perspective on tourism than other stakeholders such as entrepreneurs.

- On the whole, tourists do definitely appear interested in visiting cultural attractions and sites. Local traditions/culture is an important motivator of travelling to a certain destination and it is important for most visitors to get a taste of local culture and traditions.

- Tourists are generally less satisfied about the number and diversity of cultural attractions than tourism entrepreneurs, who feel quite positive.

- Entrepreneurs often feel that cultural tourism is not well developed in their case studies. However, in the urban and central areas both tourists and entrepreneurs appear more satisfied about the cultural offer, and entrepreneurs are more positive about the state of development.

- Residents are more inclined to feel that tourist numbers are (very) high in their area than entrepreneurs, this is even the case for residents of areas that are seen as under-touristed. This is clearly visible in Figure 1, where the majority of surveyed residents feel that tourist number are (very) high, whereas an even larger majority of tourism entrepreneurs agree (strongly) that tourist numbers should be higher in the area. However, in general, most residents (except in mass-tourism areas) do feel that the impact of an increase of cultural tourism could be (very) positive. Also entrepreneurs see value in the increase of cultural tourism, and see an important role for the (local) authorities to help and invest. They tend to feel that tourist numbers should be higher in the area.
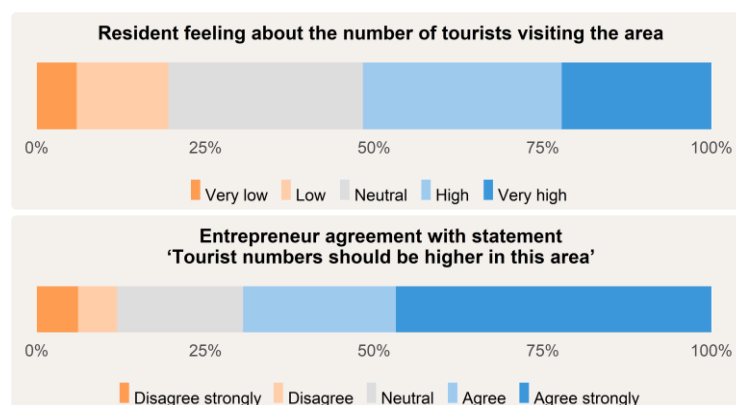
Figure 1: Resident feeling about the number of tourists visiting the area (top) and agreement of tourism entrepreneurs with the statement 'tourist numbers should be higher in the area' (bottom).

Policy Implications and Recommendations

The following recommendations can be formulated from the above signals and analysis in the section of the conclusions:

- Focus on the development of (transport) infrastructure, where there is often a lot of potential for improvement. Extra attention should be paid to the user experience of tourists and locals.

- Provide more information and better communication to tourists. Tourists, entrepreneurs and residents should be surveyed to gain insight in which way information is best communicated.

- The innovative tool (SPOT-IT) will serve as part of the infrastructure required to cover the gaps raised particularly by tourists and business owners. So the SPOT-IT tool can be used for further research to reduce the information gap for tourists.

- Increase focus on and involve local residents in the development of cultural tourism, even if their opinion about the growth of cultural tourism differs from that of entrepreneurs. To make this process more inclusive and legitimate, citizen involvement should be facilitated and stimulated.

- Increase the digital offer of information (such as a digital preview of a site or building) to improve visibility of cultural attractions, sites, activities, and even local traditions and culture. A platform should be established at EU level to provide information on cultural tourism and activities within the EU.

- Show tourism entrepreneurs, who feel quite positive about the number and diversity of cultural attractions, that tourists are generally less satisfied. Channels can be established linking tourists and entrepreneurs to measure tourists needs and to motivate entrepreneurs to be more involved in cultural tourism activities.

- Organize meetings among local entrepreneurs, to investigate how cultural tourism can be improved. Measures are necessary to protect 'uniqueness' without complete commodification.

- To promote cultural tourism, make a distinction between urban and rural areas, between central and peripheral areas and between over- and under-touristed areas. Investigative surveys should be (micro) area specific to identify differences in for example over- and under-tourism.

- Make (as EU) a difference in promoting cultural tourism in over-touristed and under-touristed areas in cases of regional development. Create networks for residents and entrepreneurs in under-touristed areas to promote further development of cultural tourism. Create networks for residents and entrepreneurs in over-touristed areas to enable the discussion on how cultural tourism can grow without negative impacts for residents.

- Signals from researchers indicate that residents may find the impact of tourism to be very positive in terms of economic gain, jobs, etc., but they also tend to believe it is quite negative in terms of housing affordability and loss of local cultural traditions and identity. These can be important topics for further research.

1. Introduction

1.1. Project context

This report has been written for SPOT (Social and innovative Platform On cultural Tourism and its potential towards deepening Europeanisation), a three year project that started in January 2020 and will end in December 2022. It is funded by the European Commission within the framework programme Horizon 2020.

The goal of SPOT is to develop a new approach to understand and address cultural tourism and to promote sustainable development of cultural tourism in disadvantaged or privileged areas.

Almost every European perceives identity at different hierarchical levels. It is possible to conceive of European identity as a cosmopolitan one based on a cultural logic of self-transformation, rather than as a supranational identity or an official EU identity related to tension with national identities. There is probably no tool more effective for linking individual identities at the citizen level than cultural exchange, in which tourism has a primary place because it brings people into immediate physical contact. Landscape stands out as a convincing mediation platform between cultural tourism and Europeanisation through the individual appropriation of the values that it conveys and spreads in tourism practices (see Figure 2).[1]
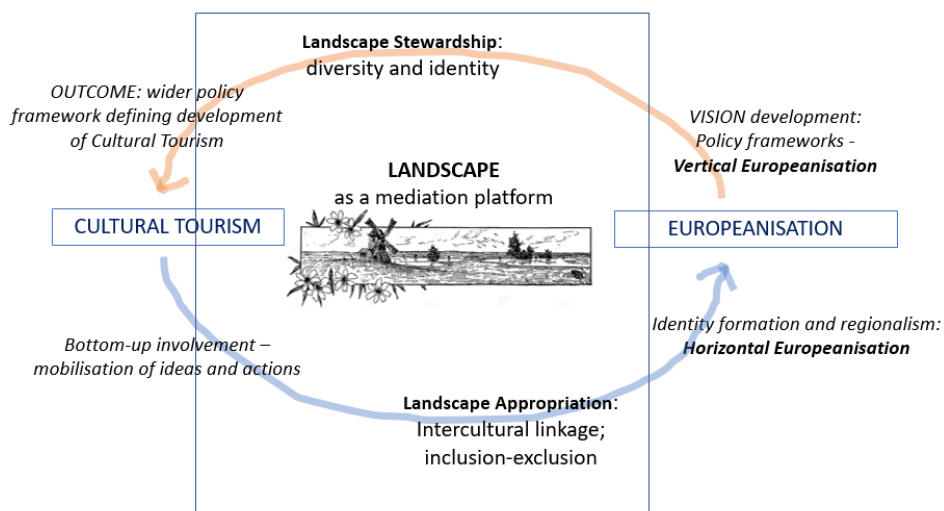
Figure 2: Schematic representation of the relationships between Europeanisation and Cultural Tourism through landscape.

On the one hand Europe is a key cultural tourism destination thanks to a remarkable cultural heritage that includes museums, theatres, archaeological sites, historical cities and industrial sites as well as music and gastronomy (McKercher and Du Cros 2007, Prentice 2001). Regions that host these forms of cultural tourism are privileged areas.

On the other hand, there are disadvantaged regions in Europe with no or fewer forms of cultural tourism. Because cultural tourism can lead to economic growth, stakeholders try to stimulate and support a sustainable development of cultural tourism in disadvantaged areas.

The EC funded different projects to redefine the concept of cultural tourism and to provide European regions with strategies that engage stakeholders to co-create cultural tourism practices. Different literature reviews of studies to cultural tourism show us that the concept of cultural tourism is changing (Richards 1996,

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[1] Article still in prep. In August 2022 we hope to update this reference with the correct journal, title and authors.

McKercher and Du Cros 2007, Richards 2018). The traditional forms still exist – focusing on museums, art galleries, landscapes, historical sites, festivals – but both cultural destinations and the tourists are under transformation. Many 'cultural tourists' see themselves neither as seeking culture nor as tourists; there is increasing evidence (Prentice 2001, Richards 2018) of people seeking to experience culture rather than merely observing it. That is: agritourism where visitors want to experience rural life; people wanting to visit the actual venues of TV crime thrillers; culture being explored by those using themed routes in winery regions or via pilgrimage.

These trends provide opportunities to both revitalize poorer and rural areas through economic and social development while protecting local culture and landscape. The project brings an extension of existing policies and the promotion of new approaches. Regions with over-tourism show us that sustainability is important. Positive and negative aspects of cultural tourism exist; a balanced development path needs to be sought. The project helps to identify themes and areas where intervention at local, regional, national and European levels may assist in achieving successful developments, managing that balance and offering solutions. In the end it is all about identifying opportunities and developing strategies, allowing local people to benefit from their precious cultural assets.

1.2. Collecting data with questionnaire surveys

One of the methods and techniques to collect data is to work with questionnaire surveys. Surveys offer us a quantitative understanding of the meaning and importance of cultural tourism for the regions involved. This involves collecting data from key informants in the case studies like tourists, residents and tourism and culture related entrepreneurs as important target groups.

The main goal of Work Package 1 was documentation and data collection. In the first research design the most import tasks were collecting statistical data and doing semi-structured interviews. Because of issues with gathering the statistical data and problems with arranging interviews, due to the COVID-19 pandemic, we decided that surveys are a good alternative.

When developing a template for the statistical data collection from existing databases, many of the other SPOT teams commented on the type of data requested for several indicators. There are indicators that request objective data and indicators that request subjective data. Subjective data are data where people are asked about perceptions or experiences. With the SPOT teams it was decided to remove the subjective indicators from the quantitative data collection template and to gather these in surveys. The reason for developing surveys using questionnaires is not only because of the subjectivity of the data, but also because it proved to be very difficult to collect statistical data (e.g. demographics) for a large number of indicators in the categories "tourism" and "case study". If there is barely objective quantitative data available in existing sources, the second best option is to generate data for the cases with surveys. The subjective data from the surveys can then also be analysed quantitatively and statistically.

Questionnaire surveys were specifically introduced as an alternative for the semi-structured interviews, which were mentioned in the project proposal for case study research and that were expected to result in hardly more useful results though requiring much more effort.

When the COVID-19 pandemic came up in early 2020, the SPOT teams realized that this would affect our research methods. Conducting interviews was seen as an obstacle: both by the researchers themselves or their knowledge institutes and by the persons to be interviewed. It was unclear whether there would be enthusiasm for interviews in these hard times. An advantage of questionnaires is the possibility to conduct them online and the possibility for respondents to fill the survey in their preferred time. This survey report has been produced within the context of these two developments. Moreover the COVID-19 pandemic has been responsible for more than just issues of how to implement the questionnaire survey, i.e. it forced us to reconsider the whole research design of our WP1.

1.3.   Objectives of this survey report

This survey report is the result of work of 15 SPOT-teams and is one of the deliverables of Work Package 1 (WP1): Documentation and Data Collection. We refer to the website http://www.spotprojecth2020.eu/ for an explanation of the other work packages.

In the SPOT project case study areas from regions in 15 countries have been studied to understand the role of cultural tourism and to show the latest developments and trends in cultural tourism. Our assumption at the start of the research in the research proposal was that geographical, physical features and conditions strongly determine the opportunities and limits for cultural tourism. Therefore, the criteria for case study selection were all based on differences in geographical, physical features and conditions between case study areas.

The main objective of this research is to describe and analyse information of tourists' experiences and the views of residents and tourism entrepreneurs on the current situation and future potential of cultural tourism, in order to compare different case study areas individually or as part of a cluster (under- or over-touristed, deindustrialised, urban and/or rural, remote peripheral or central).

We also had to pay attention to the topics of cultural tourism and its situation during the COVID-19 restrictions because of the influence of COVID-19 during the research (experienced changes, new opportunities, etc.).

For this survey report first the main topics were characterized from the research proposal honoured by the European Commission. The research goals of this survey were to study the following topics in different case studies:

- Type of cultural attractions (museums, townscapes, landscapes, etc.)
- Types of cultural tourism (day trips, overnight stays, cultural routes, mass tourism – personalized tourism – ecotourism, etc.)
- Accessibility through various transportation means
- Tourism pressure on quality of life (ranging from too little to detrimental for existing values)
- Identified tendencies in tourism growth or decline
- Identified opportunities for tourism growth, or for increase of quality tourism
- The impact of COVID-19 on Cultural Tourism
- Identifying types of cultural tourism in the 15 case studies
- Main differences between identified types of cultural tourism in terms of sustainability, and opportunities for sustainable future development of cultural tourism.

1.4.   Case studies

This report shows the results of surveys with tourists, residents and tourism entrepreneurs in 15 different regions in 15 countries. See the map in Figure 3 and see Box 1 for a short introduction of the 15 case studies. The case studies are chosen by each of the SPOT partner teams to exemplify the different aspects of cultural tourism being developed in the project: spatial features such as peripheral locations, deindustrialised and urban locations and social features such as the role of local stakeholders, the extent of over-tourism and under-tourism and the relationship to local/regional/European identity.

A map of the participating countries and the location of their case studies is shown in Figure 3. Some case studies consist of multiple sub regions, these are shown on the map as a single point using the centroid of these subregions.

In this report ISO 2-digit country codes are used to define the case studies in tables and graphs, this is done to make them easier to read. The case studies and their accompanying codes can be viewed in Table 1.

Table 1: Case study areas and the accompanying codes used throughout this report in tables and figures.

Case study area	Code	Case study area	Code
Styrian Iron Route	AT	Piedmont Landscape and Literary Park	IT
South Moravia	CZ	Kinderdijk in the Water Triangle	NL
Leichhardt Land	DE	The Valley of Palaces and Gardens, Lower Silesia	PL
Ida-Virumaa	EE	Buzău Carpathians and Subcarpathians	RO
Art Nouveau in Barcelona	ES	Ljubljana	SI
The Cyclades	GR	Nitra	SK
City of Komárom/Komárno	HU/SK	Media tourism in Scotland	UK
Beit-She'an Valley	IL		

Figure 3: map with participating countries (highlighted in darker blue) and the point locations of the case studies with their accompanying codes (see also Table 1). Case studies consisting of multiple sub regions are represented by one point.

Box 1: A *short introduction of 15 case studies* (source: http://www.spotprojecth2020.eu/case-studies and the final project proposal).

Styrian Iron Route (Austria)
The region has been characterized by ore mining and processing for centuries, that's affected by a loss of population triggering an economic and social downturn in the region. In the development and tourism strategy mining heritage plays an important role. This case study focuses on the industrial archaeology of a distinctive region of Austria, which has been deindustrialised but also contains some distinctive sub-alpine landscapes. The case study focuses on a route linking different historic sites.

South Moravia (Czech Republic)

South Moravia is unique for the tangible and intangible cultural heritage. The historical heritage contains a collection of 70 castles and the composite landscape of the Lednice-Valtice area is a UNESCO World Heritage Site. Intangible cultural heritage is represented by wine, gastronomic and folklore culture. This case study includes the development of deindustrialised zones around the historic coal mining and present oil and natural gas mining, but also gastronomy, viticulture, folklore and distinctive landscape.

Leichhardt Land (Germany)

Most of the inhabitants of the Spreewald, also a UNESCO biosphere reserve, depend on tourism. Some of them are descendants of the first settlers in the region, the Slavic tribes of the Sorbs and Wends. They could preserve their traditional language, homes and clothing. This case study examines the potential for cultural tourism in a post-mining landscape in a peripheral part of Germany which also includes castles and other attractions.

Ida-Virumaa (Estonia)

Ida-Virumaa is a unique region that over centuries has been the contact zone between Russia to the east and Estonia to the West. Traditionally seen as an industrial region that supplies the country with its energy, Ida-Virumaa is not usually seen as the first choice cultural tourism destination. This case study would benefit from more cultural tourist exposure to enjoy the gastronomy and culture of the mostly Russian-speaking areas. The proximity to Russia could attract tourists from the East as well as the West.

Art Nouveau Barcelona (Spain)

Barcelona's Art Nouveau masterpieces are found scattered throughout the city. Some, especially those designed by architect Antoni Gaudí, are essential visits for tourists, while others are highly unknown, even to locals. The area in the Eixample district known as the 'Quadrat d'Or' (Golden Square) contains the greatest number of modernist buildings. This case study looks at the very popular tourist destination associated with the distinctive modernist architectural traditions of Barcelona, including Gaudí and the Art Nouveau movement. It is focused on a major city where there has been a strong reaction to over tourism.

Cyclades Islands (Greece)

The cultural and archaeological heritage of the Cyclades is multifold, spanning the whole historical timeline since prehistory. 'Traditional' Cycladic architecture is unique and famous, dating back to byzantine or late-byzantine times. Practices, such as stone-masonry, ceramic crafts, weaving/ embroidering and gastronomic techniques have been preserved and practiced through the centuries. This case study includes both over-touristed areas such as Mykonos and Santorini as well as under-touristed ones in the more peripheral islands. Cultural tourism attractions include gastronomy, architecture, religious sites and folklore.

City of Komárom/Komárno (Hungary/Slovakia)

Komárom is regarded as one of the oldest inhabited settlements which has been populated since the Stone Age. After the Trianon treaty, which followed World War I, the town became separated. The southern part, Komárom, belongs to Hungary and the northern part as North-Komárom (Komárno) belongs to Slovakia. This case study looks at the communities of ethnic Hungarians straddling the border with Slovakia. It involves the historic fortifications and castles of this border zone and the interrelationships of communities on both sides of the river border.

Beit She'an valley (Israel)

The town of Beit She'an is one of the oldest in the Land of Israel. The archaeological excavations of Tel Beit She'an reach back as far as the Early Chalcolithic period ($5^{th} – 6^{th}$ millennium BCE). The town was established in the early 1950s based on new migrants particularly from North Africa and the Middle East. This case study considers the experiential cultural tourism associated with old historic settlements as well as a rural space dominated by Kibbutz type settlements in this peripheral part of Israel.

Piedmont Landscape and Literary Park (Italy)

The Piedmont Literary Landscape has been founded on the literary heritage of this territory and is also strongly characterized by important and well-known vineyards, the production of fine wines and other rare local products. This case study focuses upon the literary heritage of the Piedmont area where a number of famous authors lived and worked. It includes viticulture and gastronomy to share the settings and lifestyles embodied in the novels of well-known authors.

Kinderdijk in the Water Triangle (The Netherlands)
The nineteen windmills of Kinderdijk, also a UNESCO World Heritage site, are the best known windmills of The Netherlands. After the UNESCO assignment the number of tourists increased explosively, many of whom travel by tourist bus and stop only for photo opportunities. As most of the mills are still inhabited and the area is not designed for such a large tourist flow, tourism in Kinderdijk creates problems. The income tourists bring is needed for management and maintenance, but the current flow creates an unliveable situation for those involved. Tourist arrangements around historic Dordrecht, Biesbosch National Park and Kinderdijk World Heritage, together known as 'the Water Triangle' may alleviate the local pressure and jointly illustrate the story of the water.

Valley of Palaces and Gardens, Lower Silesia (Poland)
The case study area covers two rural communes located in the border region Lower Silesia, southwest Poland: Janowice Wielkie and Mysłakowice. The characteristic feature of the whole Western Sudetes area is a diverse mountain landscape, enabling the development of nature tourism and various forms of active tourism. However, the case study area also has great potential for cultural tourism development based on its local multicultural heritage. We find here a variety of types of knightly and noble residences. Here, the finest European families founded their residences: Habsburgs, Hohenzollerns, Schaffgotschs, Czartoryskis, Radziwiłłs, Hessian and Oranean princes. Therefore, this area is known as the Valley of Palaces and Gardens.

Buzău Carpathians and Sub-Carpathians (Romania)
Buzău Carpathians and Subcarpathians are characterized by a dominant rural economy, facing complex socio-economic and environmental challenges which are reflected in the intra- and inter-regional disparities, and ultimately in the low quality of life of rural communities. The study-area has a high tourist potential, both natural and anthropic, streaming from the complexity and diversity of natural landscapes and local historical background. This case study focuses on the distinctive ethnic cultural heritage associated with rural lifestyles in the mountain region of Romania, where agriculture follows many traditional patterns found in Europe one hundred years ago.

Ljubljana (Slovenia)
Ljubljana is the capital city of Slovenia. The city is the most visited city destination in Slovenia (1 million arrivals per year, 6% domestic, 94% foreign) as it has a rich cultural and historical heritage, for example urban architecture, gastronomy, festivals, galleries and museums. The city is known for its renowned architect Jože Plečnik, who helped to design and improve the city and its infrastructure. The cultural offer, although quite diversified, it is not world renowned and therefore stays predominantly visited by the domestic visitors. Thus, this project can facilitate the better utilisation of the existing cultural potential and cultural offer also in the context of international tourism.

Nitra (Slovakia)
The ancient city of Nitra is situated in the south-western part of Slovakia, at the bottom of the Zobor peak and on the banks of the river Nitra. The farmable location at the crossing of ancient roads – the river Nitra and the bottom of Tribeč predestined this place for origination of a settlement. Nitra played a key role in the history of the Great Moravian Kingdom and of the young Hungarian kingdom.
Nitra was a symbol of historical values and traditions for the Slovak nation. This important strategic point at the southern bottom of the Zobor peak was repeatedly of key importance in the history of central Europe.

Media tourism in Scotland (United Kingdom)
This case study looks at media tourism. The various genres include historical fantasy, detective drama, action and superhero media and over the past 30 years of which have prominently feature in Scotland. This involves cultural tourism in relation to visits to sites used as film and TV series locations in media products related to Scottish history and heritage such as the "Outlander" series but also "Braveheart", "Mary Queen of Scots" and others.

1.5. Clustering the case studies

We explored the opportunities for clustering the case studies in this report. The way in which these case studies fulfil the relevant criteria are presented in Table 2. These relevant criteria and their assignment to the case studies have been taken directly from the SPOT project proposal. However, due to changes possibly made in the decision on the exact delineation of the case study areas after the proposal, it could be that a certain criteria is no longer as appropriate for a case study. Due to the size of the case studies it is possible

that multiple criteria that seem contrary apply. For example, a large case study area can contain both urban and rural areas, and suffer from over-tourism in one part, but under-tourism in another. Also, due to the unique nature of each of the case study not every case study will fit the criteria perfectly.

Case studies have been clustered into three groups based on a number of characteristics (over/under tourism, rural/urban, deindustrialised, central/peripheral, media tourism). The clustering has been done before the surveys were conducted.

Table 2: Case studies were clustered into four groups based on a number of criteria (over/under-tourism, rural/urban, deindustrialised, central/peripheral, media-tourism). Clustering has been done based on the SPOT project proposal.

Group	Code	Case study	Over-tourism	Under-tourism	Urban	Rural	Deindustrialised	Central	Peripheral	Media-tourism
A	ES	Art Nouveau in Barcelona	•		•			•		
	NL	Kinderdijk in the Water Triangle	•			•		•		
	SI	Ljubljana	•	•	•			•		
	HU/SK	City of Komárom/Komárno		•	•	•		•	•	
	SK	Nitra	•	•	•	•		•		
B	CZ	South Moravia		•	•	•	•	•	•	
	AT	Styrian Iron Route		•		•	•		•	
	RO	Buzău Carpathians/ Subcarpathians		•		•	•		•	
	DE	Leichhardt Land		•	•	•	•		•	
	PL	Valley of Palaces and Gardens		•	•	•	•		•	
C	GR	The Cyclades		•	•	•			•	
	EE	Ida-Virumaa		•	•	•			•	
	IT	Piedmont Landscape and Literary Park		•	•	•			•	
	IL	Beit-She'an Valley		•	•	•			•	
	UK	Media tourism in Scotland	•	•	•	•			•	•

1.6.   Central question and research questions

The central question for this survey report is as follows:

What similarities and differences exist in tourists', residents' and entrepreneurs' experiences and views on cultural tourism in different case study areas (*individually or as part of a cluster: under or over touristed, deindustrialised, urban and/or rural, remote peripheral or central*) and what are the potentials of cultural tourism?

To analyse the results of the three surveys (tourists, residents and entrepreneurs) there are three further sub questions, that will help in answering the central question.

These are:

- Sub question 1: what is the behaviour and experience of tourists visiting the destinations and what are their interests regarding cultural tourism?
- Sub question 2: what is the view of residents on cultural tourism in their area and what is the impact of (cultural) tourism?
- Sub question 3: what is the current situation and future potential of cultural tourism according to tourism entrepreneurs?

Shortly after the start of this project, we had to deal with COVID-19. The research questions and the questions in the surveys were mainly focused on the period before COVID-19. Due to the influence of COVID-19 on cultural tourism, we could not avoid asking about the influence of COVID-19 on cultural tourism. The respondents were informed that the questions were mainly aimed at the period before COVID-19, unless stated otherwise in the question.

Due to the alleged influence of COVID-19 on cultural tourism, a fourth question was added:

- Sub question 4: what is the influence of COVID-19 on cultural tourism?

1.7.   Reading guide

This report first explains the methodology of how the surveys were conducted (chapter 2). After, the results of the surveys are presented. In chapter 3 the results are presented on the behaviour and experiences of tourists with cultural tourism in the case studies. The views of residents on cultural tourism in their area and the impact of cultural tourism are presented in chapter 4. In chapter 5 the view of entrepreneurs on the current situation of cultural tourism in their case study areas and the future potential are presented. The report concludes with a chapter in which these results are related to each other and it is examined to what extent the cluster criteria influence cultural tourism in the case study areas. Conclusions, policy implications and recommendations are presented (chapter 6).

2. Methodology

2.1. Introduction

In this chapter we first describe the significance of surveys for research (section 2.2) and we indicate which quantitative sample sizes are required for reliable, valid analysis. It is immediately worth commenting that because of the global COVID-19 pandemic the required number of 100 participants per target group for a survey could often not be achieved. Nevertheless, the surveys do have a qualitative significance because even with low numbers per target group the developments of cultural tourism in the case studies and the diversity of the responses can be assessed. After, we describe the approach for conducting the surveys: from developing questions and sampling, to analysis and conclusions. The methods of data collection, data processing and analysis, in collaboration with the SPOT teams, are presented in section 2.3. Section 2.4 is a description of how the SPOT teams brought the surveys into practice. Special attention is paid to the used sampling methods, the introduction of the surveys to the target groups and the timeframes when the interviews were conducted. In section 2.5 we present methodological limitations which possibly influenced the survey results.

2.2. Quantitative and qualitative meaning of surveys

Surveys usually only include the quantitative statistical variant of population-descriptive research. This mainly concerns the estimation of frequencies of behaviour, experiences and opinions in the population. Statistical analysis is central to the survey methodology. The reliability margins are thus calculated as a measure of the population estimates.

In quantitative survey research a lot of attention is paid to whether surveys are representative by looking for the size of the population, reliability, accuracy, the desired margin of error and the desired confidence level (Blair and Blair, 2015; Swanborn 2015). These aspects are expressed in numbers and percentages, which is why we speak of a quantitative approach. The size of the population has to be determined. If the aspect of representativeness is important then the desired margin of error must be determined as well. The margin of error, also known as the confidence interval, indicates the extent to which survey results correspond to the opinion of the entire population. The smaller the margin of error, the more the results can be trusted. The larger the margin of error, the less certain that the results are somewhat representative of the entire population within a case study area. Another important aspect for the representativeness is the desired confidence level. This indicates how confident you can be about the margin of error, i.e. how often the actual percentage of the population that would choose a given answer is within the margin of error. In market research, the error margins are generally calculated at a confidence level of 95%. The lowest confidence level generally used in surveys is 90%.

From a methodological point of view, ideally we should first determine the population: how large is the number of inhabitants in the case study area? How large is the average number of tourists in the case study area? How large is the number of businesses related to cultural tourism in the area? Next, a margin of error is chosen and the size of the sample (N) is determined. With a margin of error of 10%, a population of 100 already has an N of 50 and with a population of 1000 (or more) there is often an N of 100. With small samples with an N of 35 or 40, we cannot do much in terms of validity.

We have received feedback from the SPOT teams that a sample size of 100 or 50 is often not feasible, especially due to difficulties arising from the global COVID-19 pandemic, but a minimum of 40 should be feasible. Therefore, the following points has been agreed with the SPOT teams.

- ▪ The minimum number of participants that one tries to consult within each of the three groups is 40. This is a target number and therefore an effort obligation rather than a strict minimum number or a result obligation.

- There are different sampling methods. In our surveys we go for random sampling where possible, and purposive sampling when random sampling is not feasible (see section 2.3.2).
- A number of 40 is often too small. In such cases the results may not be statistically significant and reliable conclusions cannot be linked to the individual cases. However, still a database can be created across all cases that can be statistically significant.

Despite the low reliability and validity, there are also qualitative reasons for wanting to conduct a survey. Surveys can offer a broad view about the current situation and the potential future situation of cultural tourism. Beside the presented quantitative approach of surveys there is also a qualitative approach to surveys to describe a population based on observations of some members of the population. 'The Survey handbook' (Fink, 2003) dedicates a paragraph to qualitative survey analysis and compares it against statistical surveys. In her view, qualitative surveys are certainly useful for the exploration of meanings and experiences of people. The primary aim of this qualitative approach to surveys is not to estimate frequencies, but to describe the diversity within a population. For example, what differences are there between entrepreneurs and residents in dealing with cultural tourism?

Surveys can also be a stepping stone to interviews: it can help in determining who can be approached for in-depth interviews and to formulate questions for semi-structured interviews.

In this research mostly quantitative questions were used, based on numerical scales (e.g. Licert scales). However, some qualitative questions on opinions about for example missing facilities were asked to capture what tourists, residents and entrepreneurs would like to see in the case studies.

2.3. Methodological steps used for the surveys

Due to the uniqueness of each case study, and the global COVID-19 pandemic, we gave the SPOT teams the freedom to decide for themselves the methods of sampling, surveying and data collection that best suited their specific situation. This will be further elaborated on where relevant in each of the following sections.

2.3.1. Creating surveys

The three survey questionnaires have been developed together with all SPOT partners since the beginning of April 2020 to the 10th of July 2020. These surveys are included in the appendix (section 8.1, 8.2 and 8.3) of this report. It was a big challenge to come to a consensus about the surveys, due to the different perspectives and opinions of the partners.

The first step for developing the questionnaires was setting the knowledge goals, the objectives and themes for the surveys as described in section 1.3. The second step was to determine the target groups for the surveys. Initially, it was decided to survey only two groups: residents and tourists. We defined tourists and residents as follows.

Tourist: an adult who visits the case study area (for one or multiple days) and came from another region in the country, another country in Europe or another continent.

Resident: someone who lives in the case study area.

In April 2020 the researchers from WP1 developed questionnaires for these two target groups in English. In two rounds of feedback from the SPOT teams these questionnaires were finalized on the 10th of July.

In May 2020 the decision was made to perform a survey with another target group: entrepreneurs related to culture and/or tourism. This category of entrepreneurs should be understood broadly. For example, it includes not only hospitality or tourism businesses, but also cultural institutions. Our definition of a tourism entrepreneur is as follows.

(Cultural) tourism entrepreneur: someone who owns a business related to tourism and/or culture in the case study area, or is a CEO or (senior) manager at this business.

The person interviewed has to possess the knowledge needed to answer the questions in the survey and therefore this will often mean that an owner or a (higher) manager will need to be surveyed.

Due to time constraints owing to the late decision on a third target group, there was only one round of comments for the entrepreneur questionnaire. Further on there was some discussion on whether civil servants and other researchers should be added to this third target group, but it was decided to consult them through interviews. Here is a clear synergy with Work Package 2, where roundtable meetings were organized and it was possible to discuss the results of the surveys. To enable this, draft versions of the three chapters containing the results of each of the surveys were distributed before August 2021.

We have chosen primarily closed (multiple choice) questions for the surveys, with standardized answers, because this type of question enables easy processing. Although it is difficult to get opinions from the people questioned with these kinds of questions, it is possible to collect good factual information. The questions in the surveys were related to topics of (cultural) tourism. We attempted, by formulating clear questions and not making the surveys too long, to reduce the chance that respondents would exit the survey before finishing. However, our experience was that the surveys were not always clear (see section 2.5) and that the questionnaire for entrepreneurs was too long. Despite these experiences, the SPOT teams mostly managed to collect the data.

Unfortunately, because of the impending summer vacation and because of COVID-19, we were unable to conduct pilots to test and adjust the questionnaires. All researchers realized that there was limited time to conduct the surveys. Due to the nature of tourism, the months of July and August were best for conducting surveys, but this also meant that these had to be planned in the holiday time of the researchers.

2.3.2. Sampling

Beforehand we communicated to the SPOT teams that the preferred sampling method would be random sampling. Also, ideally it should be a representative sample of the population of residents, tourists and entrepreneurs. For example, if a certain proportion of tourism-related entrepreneurs are museums, then this should be reflected in the number of museums that are surveyed. However, it was up to the SPOT teams themselves to define what suited best their case studies and the method of surveying therefore was determined primarily by the SPOT teams themselves. This will be further elaborated on in section 2.4. The reason for this freedom in methodology is because of the enormous differences in type of case study areas. In one case study the study area is a city, whereas in another it's a large rural area, or multiple islands. Because of these differences there is not one approach suitable for all case study areas. The surveying methods were further complicated by COVID-19 and COVID-19 related measurements, that manifested differently in each case study.

With field research there is always some risk of bias. Therefore, SPOT teams were not expected to take a perfect sample that is 100% representative. In order to get an idea about the sample accountability for each of the case studies, the SPOT teams were requested to report on the following for each sample of the target groups: 1) what was the sampling method, 2) why was this method used and 3) what were the possible consequences of this approach for the quality of the research. Of course, every effort has been made by SPOT teams to ensure that the sample is as representative as possible.

2.3.3. Conducting the surveys by the SPOT teams

Methodological guidelines (such as sampling requirements etc.) were developed by the WP1 team and approved by the PMB. It was then decided that, based on the master questionnaires and the agreed methodological guidelines, each SPOT team would implement the surveys at their own discretion and using their most convenient tools.

Each team had several options of conducting surveys and it was possible to use more than one method.

- ▪ Surveys can be conducted digitally. Teams decided themselves which software was used. The overall experience with online surveys (for example with invitations send out via email) is that only 15 to

20% respond. This means that a much larger number of surveys must be sent in order to reach the required number of responses, which means that the total sample size has to be increased. One can distinguish between several categories of non-respondents, such as a) those who were in the sample, but not accessible for a survey, b) those who have refused to take part and c) incomplete or interrupted surveys.

- Paper surveys can be handed out manually to potential respondents. Researchers copy the data later in an Excel file or in a digital version of the survey.
- Surveys can be taken via phone. In this case the researchers ask the questions and gives the options, after which the respondents answers them. An advantage of this is that the researchers can check whether questions are properly understood and can enter the data correctly. Answers can be inserted directly into an excel sheet or in a digital version of the survey by the researcher.

During the months of July 2020 through February 2021, survey results were collected by the various SPOT teams. As stated before, each SPOT team did this in their own way. This often meant that in addition to an English version of the questionnaires, they also had to work with translations of the questionnaires into their own language. Initially, each SPOT team was given the opportunity to collect survey data for all three target groups until the end of October 2020. It soon became clear that many countries were struggling to achieve the minimum number of respondents, and needed to extent this period. In the extra time given, some countries have managed to increase the number of respondents. For two case studies, Barcelona (Spain) and Media tourism in Scotland (United Kingdom), some (tourist and entrepreneur survey in the case of Barcelona) or all surveys (Media tourism in Scotland) were conducted approximately a year after this time period, due to serious COVID-19 related constraints. These results were included in the final report at a later stage. It was the team's own decision whether to continue collecting responses or not, for example, due to the high work load the Dutch team decided not to continue collecting responses for the entrepreneur survey.

After the fieldwork period, almost 1000 tourists, over 1700 residents and over 900 businesses were surveyed in 14 EU Member States and Israel. The sample sizes varied between countries, ranging from about 40 (or even 9 in the case of the entrepreneur survey) to about 400. Specific numbers can be found in the chapters containing the results of each survey and can be viewed in Figure 4.
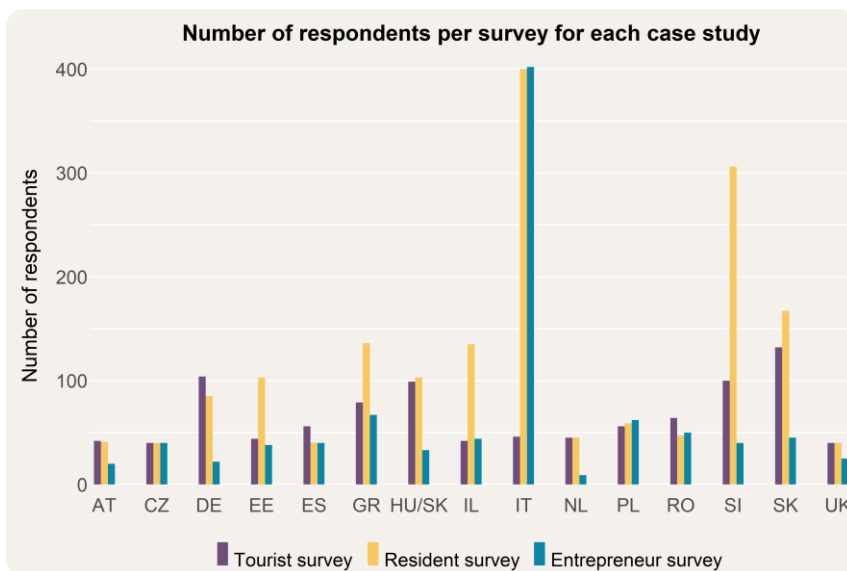
Figure 4: The number of respondents for each of the conducted surveys (for tourists, residents and entrepreneurs) for the fifteen case studies.

2.3.4. Data processing and analysis

To bring together all the different surveys, we created a data template with all the response categories to which the data had to be transferred by the SPOT teams. This was necessary to create a common data

structure that can be easily used for data processing. Therefore, the researchers of the SPOT teams were required to enter the data of the surveys in this data template in Excel. We combined all the data in one Excel file, after which each of the questions was further processed and studied. During this process, several problems arose (see section 2.5).

The completed templates form the foundation of the survey analysis. These completed templates will be made available to the EC in the context of open data, separately per target group of the surveys.

Next, instructions were prepared by WP1 to create case study reports from the surveys. These instructions were provided on December 17 2020 for residents and tourists and on December 24 2020 for businesses. The SPOT teams used these instructions and their data templates to create case study reports. Most case study reports were delivered to us in late January 2021. These reports are very valuable because they can relate the survey data to the specific contexts of the case studies. The SPOT teams may yet collectively make a decision to make the case study reports available via open data.

We as WP1 researchers created this summarizing report based on the completed templates containing data from all case studies and target groups, as well as the case study reports (where necessary). Graphs and tables were created where appropriate and the results (in absolute numbers or percentages), comparing the case studies, were described. Each survey is described in its own chapter. We clearly indicated for which (sub)groups the scores were valid. Next, the results were interpreted visually and discussed to compare case studies and the defined clusters (see section 1.5). The interpretation of the results was further enhanced by intensive workshops in the first half of 2022.

Unfortunately, in some cases the required number of at least 40 respondents from residents, tourists and businesses could not be achieved. The survey with entrepreneurs in particular resulted in fewer responses, described in more detail below.

- In Ida-Virumaa (Estonia) a number of 38 respondents was achieved and in Komárom/Komárno (Hungary/Slovakia) a number of 33, i.e. the minimum number of 40 respondents was almost reached.
- For Media tourism in Scotland (United Kingdom), the Leichhardt Land (Germany) and the Styrian Iron Route (Austria) a lower number of entrepreneurs was reached of 25, 22 and 20 entrepreneurs respectively.
- For Kinderdijk (The Netherlands) collecting responses turned out to be very difficult, resulting in only nine responses. To give a view of all participating case studies, data has been included in this report.

2.3.5. Second round of surveys cancelled

Initially, the plan was to conduct the surveys in two waves: in 2020 and in 2022, as we were interested in the situation 'after' COVID-19. However, since the development of COVID-19 restrictions in the various countries were unpredictable for 2022, the PMB of SPOT decided on 14 October 2021 that a second wave of surveys would not be realistic. Instead, we decided to organise a number of joint sessions with all SPOT partners in the first half of 2022, to work towards a solid interpretation of the data we had collected. At the end of the day, this would allow us to discuss the preliminary conclusions with the stakeholders in each of the case study areas.

The survey data should ensure that the interpretation of data has significance for the scientific and practice-oriented objectives of research into cultural tourism. The data have to contribute to conclusions about cultural tourism and the case studies.

After the first data analysis by WP1 in the draft Final Report (distributed on the 24th of September 2021) we organized an online meeting on November 10th, 2021 with all SPOT-teams, to interpret and analyse the data together. During an intensive programme, we discussed

- the clustering of the case study sites,
- the conclusions to be drawn from the surveys,
- recommendations to be formulated, and
- the way forward in the year to come, to achieve the best results for the SPOT project as a whole.

Further interpretation and extrapolation of the data, including results of the other Work Packages, was planned for the first half of 2022.

2.4. Surveys in practice by the SPOT teams

The SPOT teams have worked with random and/or purposive sampling within the target groups. As was stated in section 2.3.2, the teams themselves decided on the best methods for sampling and conducting the surveys for their situation. In the following sections a short summary of these methods can be viewed per case study. In the following tables a short descriptions of these methods can be viewed per case study. Table 3 shows the sampling methods for the tourist survey, Table 4 for the resident survey and Table 5 for the survey for entrepreneurs.

Table 3: A short description of the methodology used per case study for sampling and conducting the tourist survey.

Tourist survey
The Styrian Iron Route (Austria)
Random sampling was used: making use of social media (specifically Facebook). It has been chosen as a place to address respondents. Reactions on social media and requests of entrepreneurs and people with an enormous outreach were also techniques for the random sample. Respondents are approached with an online survey, which was created with the help of the LimeSurvey software. The online surveys were introduced by social media (Facebook groups) and personal messages to companies, people with an enormous outreach, acting as 'gatekeepers' asking for their support.
South Moravia (Czechia)
Random sampling was used by making use of social media (specifically Facebook) and face-to-face interviews. With a Czech online tool for questionnaires the groups "South Moravia – Travelling, Co-travelling, Tourists, etc." were addressed on social networks. As long as the situation (COVID-19) and government regulations allowed, several interviews took place. Field survey was conducted at various festivities and feasts held within the region. With the Survio (Czech online tool for questionnaires) the groups "South Moravia - Travelling, Co-travelling, Tourists, etc." were addressed on social networks.
The Leichhardt Land (Germany)
The method used was approaching every tourist passing by until the targeted number was reached. The survey concept was developed in close cooperation with the Tourism Development Agency (TEG) of the study area and mayors of the involved municipalities were informed about the survey. The survey concept included three ways to get the information: 1. Questionnaires were send by the TEG to all providers of touristic services including tourist information offices, hotels, hostels, holiday apartments, camp grounds, restaurants, and cultural attractions. The owners/operators were asked to spread the questionnaire under the guests and to return filled ones to one of the tourism offices in the study area. 2. The questionnaire was handed out to passing by tourists asking them to fill it and bring it back to the tourist information offices. 3. Passing-by visitors were interviewed at places where tourism concentrates, in particular camp grounds, local attractions like the windmill in Straupitz as well the barge harbour in Alt Zauche (Kannomühle), and the tourist information offices.
Ida-Virumaa (Estonia)
Remote collection and use of electronic questionnaires on the TLU LimeSurvey platform. Several tourist sites assisted the researchers by offering visitors to sign up for the survey. The majority of the answers came from tourists attending Narva Kreenholm manufacturing area excursions, visitors to the Toila 1938 VR experience and attendants at the Estonian Mining Museum's adventure festival. In the final stages a few people who tagged their social media posts with "Ida-Virumaa" were also approached. Answers collected on paper were entered into the LimeSurvey environment by the project researcher.
Art Nouveau in Barcelona (Spain)
Random sampling was used, with a researcher carrying out the surveys in-person, on-site at two major Art Nouveau tourist sites in the Eixample district of Barcelona. The researcher approached all visitors exiting these sites and collected responses from all those who agreed to participate, in the order in which they arrived. After obtaining prior authorization, the researcher was positioned at the official exits and/or interior

courtyards of the two Art Nouveau sites so as not to disturb the guests' visits. An effort was made to obtain an equal number of responses from each site, with 29 ultimately obtained from one site and 27 from the other. The researcher carried out the survey by conducting in-person interviews and noting respondents' answers directly in an online version of the survey (using Google Forms) in English, Spanish, or Catalan. The researcher also carried paper copies of the survey in all three languages for respondents who wished to complete it at their own pace or maintain social distancing. Response rates were relatively low due to a lack of willingness to participate, busy touring schedules, language barriers (low levels of English), and other difficulties caused by the COVID-19 pandemic.

The Cyclades (Greece)

On-site visits of two researchers to the islands of Andros, Syros and Santorini were arranged, in order to introduce the surveys and begin the sampling. Different locations on the islands were identified as key for conducting the surveys. These locations were selected as most characteristic of the range of different conditions pertaining to tourism and culture on each island. This approach was decided upon, in order to ensure the representativeness of the incoming tourist sample, for each island. Random sampling was used by approaching passing by tourists as well as visiting tourism related businesses. Questionnaires were filled in on the spot by the respondents or by the researchers (in the form of an interview). Tourists were approached in person in cafes/restaurants, hotel lobbies and grounds, cafes, bus/port stations, playgrounds, and seaside promenades. After introducing , the researchers stated the purpose of their research and handed out printed questionnaires for on-the-spot completion. Researchers returned within the hour or the next day and collected the filled-out questionnaires. Some respondents agreed to answer in the form of an interview on the spot, while the researcher read and filled out the questionnaire for them. A number of tourists asked researchers to be sent the questionnaire electronically and filled it in online.

City of Komárom/Komárno (Hungary/Slovakia)

A method of random sampling was used. Due to the speciality of the Komárom-Komárno case study area – a town belonging to two different countries – the surveys were carried out separately with the help of stakeholders. For the category of tourists, face-to-face interviews were carried out at popular tourist places until the target number was reached. Under the coordination of KRTK the surveyors on the Hungarian side of the city were university students studying sociology. Questionnaires on the Slovakian side of the city were completed with the help of the civic association Marthos (Esterházy Academy), an organisation specializing in cross-border institutional cooperation.

Beit-She'an Valley (Israel)

Random sampling was used. Due to COVID-19 questionnaires were distributed digitally to tourists who visited the area during the last five years. Different travellers' groups have been approached via Facebook. The surveys were sent to friends and family of the researchers who were asked to forward them to potential respondents. The survey was uploaded to Qualtrics XM Platform. An uniform message was sent to all the online and mobile platforms and filled in by the respondents.

Piedmont Landscape and Literary Park (Italy)

As method of sampling, convenience sampling was chosen, trying to diversify it both for gender (reaching about the half of males and of females) and age. Finally, the result is a convenience self-selected sample, as the willingness to answer the questionnaire has been quite low. The research team planned to approach every tourist in three spots queuing for the entrance to the Tourists Office, to the Fair stands and to the Grinzane Cavour Castle until a targeted number between 12 and 20 respondents reached by each of the three researchers. The questionnaire (in Italian or in English) was administered on paper directly by the three researchers who filled it. For a better understanding, the interviewee was provided with a copy to read the text at the same time. The questionnaire was also implemented in its on-line form: digitized and uploaded to the LimeSurvey platform in Italian and English. A QR code was generated and offered to the tourists who were willing to participate to the survey but did not have the time when approached by the researchers.

Kinderdijk in the Water Triangle (The Netherlands)

A method of random sampling was used, namely approaching every tourist passing by until the target number was reached. The questionnaire was handed out to tourists passing by and asking them to fill it and bring it back to the researchers or i.e. tourist information offices. The surveys were introduced in real life situation by: oral explanation and short written introduction about the background of the research. Respondents filled the surveys.

The Valley of Palaces and Gardens, Lower Silesia (Poland)

Random sampling was used by approaching every tourist passing by until the targeted number was reached. Passing-by visitors were interviewed (and questionnaire was filled in by researcher) at places where tourism

concentrates. Surveys were conducted in person by UWR SPOT team members at tourist concentration sites in the case study area. Random sampling was used by approaching every tourist passing by until the targeted number was reached.

Buzău Carpathians and Subcarpathians (Romania)
To make the sampling method more effective, a correlation between the businesses and tourist attractions (accommodation units, restaurants, cultural sites, attractions) and the tourists was made, using internet sources such as TripAdvisor. The sampling methodology for the survey of tourists was random picking. In general, tourists found in the proximity of the tourist objectives and important visitor attractions, sites and accommodation places were addressed. The researchers tried to reach as many tourists as possible. Mixed teams of 8 researchers travelled to the study area. It is worth noting the reluctance of some tourists to answer the questionnaire. Many have argued that they do not want to be disturbed during the holidays, they are there to relax, not to be bothered. Under these conditions, the rather large team managed to reach a significant number of interviewed tourists.
Ljubljana (Slovenia)
Random sampling was used by approaching every tourist passing by until the targeted number was reached. Passing-by visitors were interviewed and questionnaire was filled by a researcher in the city centre locations where tourism activity is concentrated the most (such as Prešeren square, Tromostovje, Kongress square etc.). The survey printed on few pages included also a QR-code, which tourists could scan with their smart phone and it would lead them to a digital version of a survey. Thus, they were offered to complete the questionnaire at a more convenient time for them. As a thank-you gesture, the tourists were given tickets for free entry to the Museum and Galleries of Ljubljana cultural attraction and promotional postcards (vistas of Slovenian landscapes) of the Department of Landscape Architecture.
Nitra (Slovakia)
Random sampling was used by creating an online Google form of the questionnaire (for foreign visitors it was in English), which was published on the city's website, in the town hall newspaper and was available to all UKF staff and students. The researchers addressed visitors with an introductory text.
Media tourism in Scotland (United Kingdom)
For the visitor surveys, participants were selected because they were physically visiting the site on the days we were there. We also had an online version of the same survey which was accessible via QR code.

Table 4: A short description of the methodology used per case study for sampling and conducting the resident survey.

Resident survey
The Styrian Iron Route (Austria)
Random sampling was used. Region-related Facebook groups were selected, in which a post was shared to get respondents. Especially clubs and associations proved to be very supportive. Furthermore, people with an enormous outreach, who can be referred to as 'gatekeepers', were contacted via private messages, calling for their support and distribution of the link. Additionally, a post was also shared by the Steirische Eisenstrasse association web- and Facebook accounts. Because it didn't lead to 40 participants personal social network of the researchers was used to contact friends and associates, which resulted in a reliable and high participation as well as manifold shares via Facebook. As an extra incentive, the researchers organised a price draw among participants, who wished to leave their email addresses and enter the draw.
South Moravia (Czechia)
Random selection was used. During the face-to-face survey, locals were addressed, regardless of gender or age (random selection). For the category of local residents social media (specifically Facebook) was chosen as a place to address respondents. As long as the situation (COVID-19) and government regulations allowed, several interviews took place. Field survey was conducted at various festivities and feasts held within the region. With the Survio (Czech online tool for questionnaires) the groups "South Moravia - Travelling, Co-travelling, Tourists, etc." were addressed on social networks.
The Leichhardt Land (Germany)
Random sampling was used. The research team members went from door to door both in central parts and in edge parts of the mentioned settlements asking for an interview or to leave the forms. In case that an oral interview was not desired by the people, questionnaires were given personally. The given forms were collected one or two days later by research team members. All other self-completed forms were brought back to the tourist offices by the respondents, where the staff of these offices sent the completed questionnaires

for digitalisation and analysis to the Dresden IOER institute. The researchers addressed people in the villages of Goyatz, Straupitz, Alt Zauche and in the town of Lieberose. The selection of place-related target groups was discussed and agreed with the local tourism association regarding to cover the three different typical parts of study area from geographical aspect and people who are concerned by tourism in several ways. The SPOT project is known in the study area since the local newsletter 'Lausitzer Rundschau' printed a report about it in early summer. The survey was announced and promoted by articles in the local official journal and on the website of the study area's tourism association (TEG), the local partner of the German project team.

Ida-Virumaa (Estonia)

Responses were collected employing mixed methods: face-to-face interviews with residents at different public locations, online with advertising via local municipalities and some limited advertising on local online platforms like stena.ee and seti.ee, and by distributing and then collecting paper surveys at various public locations (mostly local libraries) in different towns. It was decided that some in-person interviews at public locations and the distribution of surveys with the help of local authorities would be best at yielding data across the county. It should be noted that since largest samples were required from towns, where most of the people live in apartments, then house-to-house surveying was not an option. Not only would researchers first need to gain access to flats in an area, where significant part of the population is economically deprived and somewhat more reluctant to engage, but it would also pose and be perceived as posing a risk during the pandemic. In person interviews were carried out in shopping centres and bus stations (often in the same space) and also in open air in Kohtla-Järve, Jõhvi, Sillamäe, and Narva.

Art Nouveau in Barcelona (Spain)

A snowball methodological approach is used in which the researchers identified potential respondents within their personal and professional circles who have lived in the Eixample district for at least two years—preferably nearby Art Nouveau sites, when possible— and then also asked them if they would be willing to help spread the survey to their friends, family, and neighbours with the same conditions of residency. The researchers did not distinguish between "natives" and "residents" for this purpose (i.e. by nationality). The researchers believe this more adequately represents the current demographics of Eixample's resident population. The researchers digitalized the survey for residents using Google Forms and also prepared translated, digital versions in both Spanish and Catalan. They began contacting potential respondents (as described in the previous section) by telephone and email, relying on our network of contacts and word of mouth to help spread the message about our project and the survey's availability. The researchers introduced the survey to the target group via a formal email containing links to the digitalized survey, with an initial mailing list of nearly 30 residents. From here onward, both the initial respondents and the research team members continued to circulate the digital surveys by email and by digital messaging services such as WhatsApp. With regards to the survey's implementation, all respondents recorded their responses through one of the digitalized Google Forms. No survey data was collected via email, telephone, or in-person interviews. This guarantees the anonymity of survey data, given that researchers had no contact with respondents.

The Cyclades (Greece)

On-site visits of two researchers to the islands of Andros, Syros and Santorini were arranged, in order to introduce the surveys and begin the sampling. Different locations on the islands were identified as key for conducting the surveys. These locations were selected as most characteristic of the range of different conditions pertaining to tourism and culture on each island. This approach was decided upon, in order to ensure the representativeness of the incoming resident sample, for each island. Random sampling was used by approaching passing by residents in public locations. Some of them agreed to fill in the questionnaire on the spot but the majority asked to be sent the questionnaire electronically and filled it in online. Residents were approached in person in central squares, local shops, hotel lobbies and grounds, cafes, bus/port stations, playgrounds, and seaside promenades. After introducing ourselves, we stated the purpose of our research and handed out printed questionnaires for on-the-spot completion. Researchers returned within the hour or the next day and collected the filled-out questionnaires. Some respondents agreed to answer in the form of an interview on the spot, while the researcher read and filled out the questionnaire for them. A number of residents asked researchers to be sent the questionnaire electronically and filled it in online.

City of Komárom/Komárno (Hungary/Slovakia)

In the phase of data recording, the researchers used the method of random sampling. Field surveys and face-to-face interviews were done at highly frequented places of Komárom and Komárno e.g. at public transport entry points until the targeted number of 40 residents was reached. To address the residents of the town, the team used social media (specifically Facebook). The online questionnaire was built with LimeSurvey and was

circulated in relevant groups on Facebook consisting of the citizens of Komárom. Under the coordination of KRTK the surveyors on the Hungarian side of the city were university students studying sociology. Questionnaires on the Slovakian side of the city were completed with the help of the civic association Marthos (Esterházy Academy), an organisation specializing in cross-border institutional cooperation.

Beit-She'an Valley (Israel)

Due to the COVID-19 pandemic, the researchers could not travel to the areas they studied. Hence they used the following methods to collect the data: 1) through Facebook: they targeted residents' groups from their studied regions (rural villages and Kibbutzim in the Springs Valley region and the town of Beit-She'an). 2) The surveys were sent to personal friends and family members of the researchers who live in the Springs Valley and Beit-She'an. They were asked to forward the surveys to anybody who could respond to them. 3) Through email correspondence with office holders in the regional council and town authorities: the researchers requested from the office holders to forward their email to local residents through their internal formal social media networking. All surveys were conducted digitally. The survey was uploaded to Qualtrics XM Platform. An uniform message was sent to all the online and mobile platforms and filled in by the respondents.

Piedmont Landscape and Literary Park (Italy)

First a selection was made of a smaller area within the case study area. Then the researchers made a representative sample of resident population, planning a quantitative survey using a quota sampling. Their quota sample was a non-probability sampling selected on the base of gender proportion and age distribution of inhabitants of 18 years and older on the municipalities with more than 500 inhabitants of AIT n.25 Alba. Numerousness of 400 comes from a pair of considerations; based on the population composition a probabilistic numerousness of the quota sample would have been about 2,500 questionnaires but, considering financial restrictions and a balance with the other two targets, UNIVR team opted to a non-probabilistic sample enlarging to the maximum the numerousness. The researchers have entrusted the survey data collection to an external company (Demetra opinioni.net) that has used both Computer Assisted Telephone Interviewing (CATI) for 291 respondents and Computer Assisted Web Interviewing (CAWI) for 109 respondents. Respondents were differently selected by the external Company. The survey activity was preceded by several sessions of discussion with some local stakeholders to verify the validity of the survey tools, especially questionnaires. Together with Third Party involved (Lamoro), regional and local stakeholders a public engagement activity has aimed at communicating and disseminating research information to the interested population.

Kinderdijk in the Water Triangle (The Netherlands)

Random sampling was used. To get respondents an article about surveys was introduced via social media and websites of involved people/organizations: Facebook, websites and newsletters of involved organizations. The surveys were introduced by social media of involved persons or organizations: Facebook and introduced by digital newsletters of involved organizations.

The Valley of Palaces and Gardens, Lower Silesia (Poland)

Random picking form telephone household database among residents living in the case study area. The survey was conducted through the CATI (computer-assisted telephone interviewing) technique. During the telephone interview, the survey questionnaire was filled in by the researcher.

Buzău Carpathians and Subcarpathians (Romania)

Random sampling was used. It was addressed to two major categories of residents: (1) the residents identified in the localities with tourist attraction sites and businesses in tourism, where the questionnaires for tourists and for businesses were also applied; in relation to this, it must be specified that, unlike tourists who were mainly sought near tourist attractions or businesses, residents were approached throughout the entire locality; (2) to a lesser extent, residents from remote localities, with reduced accessibility, with few or no tourist attractions or tourist infrastructure. Mixed teams of 8 researchers travelled to the study area. The 8 researchers were grouped in two cars and teams of 2 researchers each in order to streamline the application of the questionnaires to as many residents as possible in a short time and to provide a better coverage of the study area.

Ljubljana (Slovenia)

Data gathering was done via online platform 1KA and service (VALICON) specialising in data gathering by administering questionnaires through the online panel. The researchers started with an online survey by distributing it to different social media channels, e.g. Facebook of the Department of Landscape Architecture, Facebook of a group interested in Ljubljana city development, e-mails to personal acquaintances and to the people who participated in a similar survey carried-out in 2019. This way the sample was partially random and partially targeted.

Nitra (Slovakia)
The researchers did not make a representative sample, but a random sample. They made use of an online method creating Google form questionnaires (for foreign visitors it was in English), which was published on the city's website, in the town hall newspaper and was available to all UKF staff and students. The researchers make use of an introductory text when they approach potential respondents.
Media tourism in Scotland (United Kingdom)
For the residents we used post code sampling. Doune is a very small village and so is Galashiels, and therefore we were able to target the streets that run down the length of the high street. We had two modes of data collection for both residents and businesses- face to face, which took the form of going door to door and we also did mail drops where we would drop a survey postcard in the mailbox of each house. Each postcard had a QR code and website link that would take them to the survey. For each household, the participant would receive a gift voucher.

Table 5: A short description of the methodology used per case study for sampling and conducting the business survey.

Business survey
The Styrian Iron Route (Austria)
The researchers make use of a 2-step procedure consisting of first the online-survey (if not sufficient feedback) and a second round of personal surveying within the region. As for the survey, target groups were tourism businesses within the District of Leoben. It transpired that due to the high number of aborted or uncompleted questionnaires, additional measures were necessary. The team resorted therefore to send out the questionnaire to all relevant hotels via mail, as well as contacting certain businesses via telephone. Still the results about the number of respondents were disappointing. Business-related Facebook groups and companies were selected, in which a post was shared. Both local tourism associations in the area (TV Erzbergland und Tourismus Leoben) were contacted and asked to distribute the survey via their social media accounts. The local chamber of business declined support mainly due to the length of the questionnaire.
South Moravia (Czechia)
Questionnaires for businesses were completed with the help of one of the stakeholders. Mendelu team turned to a representative of the South Moravian Region for tourism with a request for help and used their recommendations and the list of specific companies in the given case study area. Due to this recommendation, entrepreneurs were initially accommodating, but in most cases they did not complete the answers because they considered the questionnaire too long and demanding in some questions. Entrepreneurs were approached in various ways (by email, telephone, or in person, if the situation allowed). In addition, MENDELU contacts whose business activities are focused on the tourism sector would be contacted.
The Leichhardt Land (Germany)
After adjustment, the German team elaborated a refillable PDF-Version to send and receive it via Email. Using the lists of touristic entrepreneurs in the study area of our local partner (TEG), the researchers sent 101 personalised emails to all restaurants, accommodations, and service suppliers who's email and names were known on October 20th. After additional investigations, the researchers sent 19 additional emails partly without personalisation to further businesspersons (whose names were unknown before) on October 28th. During the resident survey from October 21st to 23rd the team released some printed questionnaires to the personally met businesspersons and helped one of them by completing the questionnaire. Two completed questionnaires in written form were collected afterwards. Since the feedback was small, we decided to send another email to all businesspersons with known email addresses. In total 92 second emails were sent to all businesspersons without known answer on November 09th and 10th. The business survey questionnaires were sent out to all touristic entrepreneurs of the area shortly before the residents survey was done. Since there is a high number of in particular small touristic entrepreneurs having only one room or cottage to lend, the survey was well-known among the local population, at least among the group that is engaged and probably benefitting from tourism. But we are sure, no bias must be expected in a way that surpassingly entrepreneurs answered the residents' survey. On the contrary, we often got the feedback 'we already answered your questions' from people of this group while refusing to answer to the residents' survey (again).
Ida-Virumaa (Estonia)
All responses were collected online. The Ida-Virumaa Tourism Cluster with its 42 partner tourism enterprises and websites of businesses active in the area were used as a reference point for collecting e-mail addresses and phone numbers to contact businesses. From 87 businesses addressed, 38 completed the survey. Most

respondents are located in the northern part of the county. During three fieldwork trips when researchers collected responses from residents and tourists, local businesses were also approached. Employees were usually enthusiastic to share the contact information of their employer, however, not all people responsible for a business were equally enthusiastic to fill the survey: for some, the questions were not relevant, and some admitted they did not have time for it.

Art Nouveau in Barcelona (Spain)

Purposive sampling was used, with researchers contacting businesses both in-person and by email and telephone. Researchers first used city-wide "open data" databases to identify all accommodations, restaurants/cafes/bars, and major cultural facilities in the case study area, then emailed each of these businesses asking them to participate. Researchers next identified relevant businesses through personal knowledge, Google Maps, contact by telephone, and walking around the six neighbourhoods of the case study area. The fieldwork was initiated in October 2020, though ongoing COVID-related restrictions prevented researchers from carrying out the full number of surveys during that month. Fieldwork was resumed during January and February 2022, once researchers observed a return to a certain degree of normalcy for local businesses, with the at least partial reopening of a large part of the businesses interviewed. Businesses were asked to complete the surveys via interview on the spot or were emailed survey links in Spanish and Catalan. The vast majority of respondents preferred to answer via the online link. An effort was made to reach businesses in all six neighbourhoods of the case study area (the Eixample district of Barcelona), even though proximity to tourism and/or Art Nouveau sites varies greatly by neighbourhood. Response rates were extremely low due to a lack of willingness to participate, with just 40 responses obtained after sending approximately 600 emails, enlisting 3 local business networks to disseminate the survey to their members (200+ each network), and "cold-calling" or walking for approximately 40 hours to contact businesses.

The Cyclades (Greece)

On-site visits to the islands of Andros, Syros and Santorini were arranged in order to introduce the surveys and begin the sampling. Three different locations were identified as key for conducting the surveys. These locations were selected as most characteristic of the range of different conditions pertaining to tourism and culture on the island. This approach was decided upon, in order to ensure the representativeness of the businesses sample, for each island. Random sampling was used by approaching tourism businesses in central locations. The majority of the businesses asked the researchers to return the following days to receive the questionnaire or to fill in the questionnaire electronically. Additionally, a number of businesses was reached and filled in questionnaires by telephone. Business owners/managers and employees were mostly approached in person, by visiting business premises and specifically hotels, tourist shops, restaurants, cafes, art galleries/ museums, or leisure centres.

City of Komárom/Komárno (Hungary/Slovakia)

On the Hungarian side the questionnaires for entrepreneurs were conducted with the help of the Tourism Association of Komárom. The Tourism Association as a representative organisation was set to approach particular companies in the given area. Companies were approached by email and/or telephone. Because of the border crossing regulations introduced in Hungary, on the Slovakian side their main partner the Pons Danubii EGTC was in charge of carrying out the survey. Because of the partial lockdown in Slovakia face-to-face methods were greatly influenced. As a result, alternative methods of questioning – interviews via telephone and online approaches – were used with moderate success. Entrepreneurs were approached by email and/or telephone.

Beit-She'an Valley (Israel)

To overcome research difficulties with COVID-19, the researchers used the following methods to collect the data:

- Requesting the councils of Beit She'an and Valley of Springs to send a detailed list of all the tourism entrepreneurs and businesses.
- Searching key words online in order to extend the list, such as: B&B, hotels, restaurants, events, culture, tourism, tourists' guide etc. After locating businesses/entrepreneurs, contacting them by email, WhatsApp, SMS or phone.
- Searching for relevant target groups on Facebook.
- Asking the respondents to forward the surveys to additional tourism entrepreneurs.
- Offering respondents digital vouchers of 12 euros as an incentive.
- Based on the survey of businesses and entrepreneurs, we adjusted the survey for tourists' guides who live in the studied regions.

All surveys were conducted digitally. The survey was uploaded to Qualtrics XM Platform. An uniform message was sent to all the online and mobile platforms and filled in by the respondents.

Piedmont Landscape and Literary Park (Italy)

The research team doubted about the number of responses it would be able to get, so we proceeded by inserting the entire directory of tourism chain in Langhe and Roero (provided by the local DMO) into survey participants and prepare the questionnaire computerised on the LimeSurvey platform. Firstly, UNIVR team pointed at the smallest number of 40 respondents requested by SPOT Coordinators. When the number of respondents reached the requested number and continued to increase, we have decided to take open the LimeSurvey questionnaire to get a maximum of responses and to reach a numerousness that would have allowed to some statistical considerations. The addresses directory was furnished by the ATL LMR and the e-mails inviting participants to fill up the questionnaires mentioned their engagement and the collaboration with them. The communication of the project and its aims began in summer 2020 through a press release and the involvement of stakeholders (cf. Report on Residents Survey). The survey started during the International White Truffle Fair period, even if it would not have been the most proper, UNIVR team was sure to find the activities open. Transferring the questionnaire on LimeSurvey has been a long process in order to make the questionnaire the most responsive and the least misunderstood by readers. Some questions were not mandatory. Despite this, in general, the majority of questions reached at least 70% of valid answers (further analysis will be realised). A pre-test was made by other researchers, students and volunteers to improve the functioning and comprehensibility of the LimeSurvey questionnaire (8 people involved). Then, on the October 2020 fieldwork, a first paper pre-test was conducted on 4 businesses that are closer to the Stakeholders Board. Those questionnaires were retained in the sample (differently, they would have been invited to participate to the LimeSurvey questionnaire).

Kinderdijk in the Water Triangle (The Netherlands)

Random picking form internet database of business entities, located in the case study area. The results of about the number of respondents were disappointing. The surveys were introduced by a digital invitation to fill the surveys. The surveys had to be filled by respondents. The surveys were introduced by newsletters of involved organizations (SWEK, municipalities).

The Valley of Palaces and Gardens, Lower Silesia (Poland)

Random picking from telephone database of business entities, located in the case study area. The surveys were introduced per target group through a phone call. The survey was implemented through the CATI (computer-assisted telephone interviewing) technique. During the telephone interview, the survey questionnaire was filled in by the researcher.

Buzău Carpathians and Subcarpathians (Romania)

The selection of businesses dictated the way of conducting the entire field research in the sense that all accommodation units, restaurants, cultural sites etc. (considered as tourist attraction nuclei) were first identified, located and mapped. We took into consideration that in some LAUs (small villages, remote, with low accessibility) there is no attraction site or accommodation. As a result, we've considered some attractions that serve several LAUs. Then the tourist-oriented field research was developed around and in connection with these tourist attractions and businesses. The sampling methodology for the survey of business was the selection of the most important businesses for the study area, for each category: restaurants and cafes, accommodation, visitor attraction, site or activity. In most of cases the selected businesses were contacted by phone, then, based on their availability, we have visited them on the spot. We tried to reach as many businesses as possible in relation to get a good coverage of the main attractions of the region. We have tried to approach a variety of businesses. In the selection process, certain elements were taken into account, such as: size, services offered, scope, accessibility, etc. Most questionnaires applied to businesses were made face to face, on the spot, and filled in by the researcher. A smaller number of questions were sent online, by e-mail or WhatsApp to managers or administrators who were not available or din not have time to answer the questions on the spot when they were approached in the study area.

Ljubljana (Slovenia)

E-mail invitations to participate in the survey were sent to approximately 150 potential respondents. The invitation was also disseminated by the local destination management organisation Tourism Ljubljana and by the Tourism and Hospitality Chamber of Slovenia. The survey was adapted according to the four different groups of the respondents: (1) for tourist service providers in general, (2) for cultural attractions and institutions, (3) for hospitality sector, such as bars and restaurants and (4) for accommodation providers. The sample consisted of 40 completed surveys.

Nitra (Slovakia)
Random sampling was used by creating an online Google form of the questionnaire, which was published on the city's website and in the town hall newspaper. The researchers addressed an introductory text to entrepreneurs.
Media tourism in Scotland (United Kingdom)
For the business surveys we selected tourism related businesses in the case study areas that featured in or around the high street. Again, given the size of the villages or towns, this number was quite small.

2.5. Methodological limitations

Some discussion points regarding the methodology taken should be kept in mind while considering the results of the case studies.

Firstly, the surveys were created in English, in simple pdf documents. Upon request from the SPOT project teams it was decided that each would translate and implement their own version, in their preferred survey software. We created a data template for this purpose, so that we could easily combine the results from all teams. This turned out to be less simple and practical than expected beforehand and created a number of problems.

- Each team created their own translation of the base surveys. This could have created errors due to incorrect translations. We do not know whether this has occurred, but it is always a possibility.
- Questions could have been misinterpreted, which results in a different question when translated. An example of this is the question about the interest in visiting a number of cultural attractions in the tourist survey. It appears that several SPOT teams interpreted this question as 'satisfaction with a number of cultural attractions'. This changed the meaning of the question and therefore also the results. We are currently not aware of other occurrences, but it is possible that this happened more often.
- In the Dutch implementation of the survey (for residents) we forgot to include two questions. As far as we know this is the only case where this happened, but it is very unfortunate.
- Questions were sometimes changed to such an extent that answers could no longer be compared with the answers of the other teams, or questions were left out completely. As far as we are aware, this only happened with the three surveys of the case study Media tourism in Scotland (United Kingdom), which explains why their data is missing from most results.
- As each team implemented their own survey, each also had to transfer the data from their own results into the template created by us. Although we tried to check each template as it came in, many errors came to light only later.
  - Data was not always inserted correctly everywhere in the template. For example, columns were switched. This was not always visible as the type of data in different columns looks the same (e.g. all numbers from 1 to 5). Only when studying case study reports it would appear that columns were incorrectly inserted. We tried to check this and fix this whenever we encountered such an error. However, checking wasn't always possible (as there was not always enough information in the case study reports) and with the amount of data it was impossible to check everything.
  - The template included a sheet explaining which categories were possible for each column (e.g. only numbers from 1 to 5). However, we often encountered data outside this range. Such data was excluded.
  - Prescribed categories were also sometimes changed by the SPOT teams, or categories were added. When possible, we incorporated these data into one of the prescribed categories (e.g. 'other') but when this was not possible we excluded the data. This for example occurred regularly with the questions about occupation. This is an indication to us that this question should be changed in a potential next round.
  - Conditional questions (e.g. if answer is 'yes' go to next question, otherwise skip) were sometimes ignored. In this case also respondents that answered 'no' to the previous

question would answer the conditional question. During the analysis these data were excluded.

For some questions in the base survey, the answer categories were incomplete. For example, the question about occupation missed important categories such as 'student' and 'retired'. Such obvious options should have been included but were unfortunately not. Although some teams added their own categories, it was impossible to use these, as it was not done consistently by all teams.

Answer categories were also in some cases overlapping or excluding. This happened mostly with some number categories. Each team solved it in their own way, and it was complicated to put together again.

The number of respondents varied greatly for the SPOT teams, in the business survey for example from 9 respondents to over 200. We used all the data that was made available to us, but the differences in samples are sometimes quite large. For most case studies, the number of respondents was relatively low, although in most cases larger than the agreed minimum of 40.

Within the surveys, the number of no-replies (where respondents did not reply to a question) was often very high. This could indicate the questions were not clear and leaves room for improvement. However, we see that in some case studies there were barely any no-replies, whereas in others the number was generally very high. Probably some surveys did not allow no-replies for certain questions (e.g. for those questions where 'not applicable' was included in the answer categories). This inconsistency influenced results because in some cases respondents were required to provide an answer (which could also be 'not applicable' when a respondent did not know an answer), whereas in others they were able to skip the question.

The total numbers of respondents interviewed according to the case study reports did not always correspond with the data we received. Where possible we tried to use the data from the case study reports, since this would give a more precise picture (as we received less data), but we were not always able to get the necessary values from the case study reports.

Not all questions are relevant for all case studies. Naturally, when creating one survey for fifteen case study areas there will be questions that might not be relevant for a certain case study. This possibly also leads to a larger number of no-replies for certain questions. However, the goal was to make the results comparable among the case studies and these situations are therefore difficult to avoid. As said before, in one case study questions were changed extensively, or left out, because of this reason. As a result, data was only provided for a small number of questions.

The COVID-19 crisis also probably had a lot of influence on the results.

- First of all, it made finding respondents very hard, for example due to lockdowns. This is also the reason that some SPOT teams provided data up to one year later. Those that were able to conduct the surveys in time also had difficulties in finding respondents. Numbers of collected surveys are therefore often quite low, and it is also the reason we set the minimum of 40 surveys for each group. This minimum could not always be reached however.
- Also, the COVID-19 crisis will have influenced the answers as it changed greatly the situation of tourists, residents and entrepreneurs. This becomes already very clear when looking at the nationality of surveyed tourists. In most case studies these were primarily domestic tourists. In those case studies where there were more international tourists, the nationalities often were not those usually seen.
- Some surveys were conducted a year after the majority. This will have influenced the results of these surveys, as COVID-19 rules and measurements will have been different during this time, than they were a year previously. This is the case for the three surveys conducted in the case study Media tourism in Scotland, and the tourist survey and (part of) the business survey in Barcelona (Spain).

The COVID-19 crisis is also the reason we left the teams free in their methods of finding respondents and conducting the surveys. It would already be difficult enough, and due to the uniqueness of each case study area there is not a one-size-fits-all method. However, these differences in methodology and surveying will have influenced results.

3. Tourist survey results

3.1. Profiles of the tourists

For the surveys, samples were taken from the tourist population in the case studies. Within a sample, the aim is usually to represent a distribution of profile characteristics of tourist (e.g. over gender, age, country of origin, education, occupations, income, household compositions and place of residence) that corresponds as closely as possible to the population composition in the case study areas. Due to the global COVID-19 pandemic, and the resulting travel restrictions, this was not possible. Most of the tourists were nationals of the case studies, which is not a correct representation of the tourist population in most case studies.

In this section we describe the average profile of the surveyed tourists and which characteristics occur most often when all case studies are considered summarized. The case studies that strongly deviate from the average will be mentioned.

3.1.1. Number of surveyed tourists

The total number of tourists participating in the survey for tourists is 989 (Table 6). In the case of Barcelona (Spain), the survey was conducted in October and November 2021. For the case study Media tourism in Scotland (United Kingdom), the survey was mostly conducted in the summer of 2021. The remaining case studies held the surveys during the summer months of 2020. The lowest number of tourists participating in the survey per case study was 40. The highest number of tourists participating in the survey per case study is 132. In five case studies, the number of tourists who completed the survey was two to three times higher than the required minimum of 40 respondents: between 79 and 132 respondents in the Leichhardt Land (Germany), the Cyclades (Greece), Komárom/Komárno (Hungary/Slovakia), Ljubljana (Slovenia) and Nitra (Slovakia).

Table 6: Total number of respondents participating in the survey for tourists (N=989).

Case study area	Code	N
Styrian Iron Route	AT	42
South Moravia	CZ	40
Leichhardt Land	DE	104
Ida-Virumaa	EE	44
Art Nouveau in Barcelona	ES	56
The Cyclades	GR	79
Komárom/Komárno	HU/SK	99
Beit-She'an Valley	IL	42
Piedmont Landscape and Literary Park	IT	46
Kinderdijk in the Water Triangle	NL	45
Valley of Palaces and Gardens (Lower Silesia)	PL	56
Buzău Carpathians and Subcarpathians	RO	64
Ljubljana	SI	100
Nitra	SK	132
Media tourism in Scotland	UK	40
Σ		**989**

3.1.2. Profile of the average tourist

First of all we describe the average tourist over all cases studies. This average tourist has the following characteristics: the tourist is a woman, a national of the case study which she is visiting, and between 20 and

50 years old. She has had 15 or more years of education, and an occupation as a professional. She has a total gross household income per year between 10.000 and 40.000 euros. She is living in a two person household. She is travelling in a group of two persons and makes day trips to other areas than the case study area, but not to other countries.

3.1.3. Gender

Out of ten tourists in the case studies, there are on average 6 women and 4 men. Therefore, gender-wise the sample is not completely equally distributed. When we look specifically at the case studies we see a more than average unequal distribution in gender in the Slovakian city of Nitra (29 male and 103 female); Kinderdijk in the Netherlands (15 male and 30 female), in Ida-Virumaa, Estonia (13 male and 33 female) and Barcelona, Spain (16 male and 40 female).

The prevalence of women's opinions can, according to the involved researchers, be explained by "the higher public activity of women and engagement with local issues – quite simply, this reflects the local reality that women are much more likely to agree to participate in surveys and express opinions about local life."

3.1.4. Age

Among the tourists, the age categories of twenties (283), thirties (216) and forties (151) are most represented. This means that approximately seven out of ten tourists are in the age group of 20 to 50 years.

Zooming in on the case studies, we see that in three case studies the tourists were younger than 29 years.

- South Moravia (Czechia): 22 out of 40 tourists (55%).
- Ljubljana (Slovenia): 48 out of 100 tourists (48%).
- Nitra (Slovakia): 96 out of 132 tourists (73%).

On the other hand, in three case studies a relatively large proportion of tourists was older than 39 years.

- The Leichhardt Land (Germany): 75 out of 100 respondents (75%).
- The Piedmont Landscape and Literary Park (Italy): 33 out of 46 respondents (72%).
- The Buzău Carpathians and Subcarpathians (Romania): 46 out of 64 respondents (72 %).

3.1.5. Origin of the surveyed tourists

For almost all of the case studies 75% or more of the tourists that were surveyed come from the country in which the case study is located (Table 7). In three cases, Barcelona (Spain), Kinderdijk (The Netherlands) and Ljubljana (Slovenia) 50% or more of the tourists were foreign. In Barcelona the share of foreign tourists was over 90%, much higher than in the remaining case studies. The most common occurring nationalities in Barcelona were Italian and French (neighbouring countries), followed by German and American. In the Dutch case the two most common occurring foreign nationalities were German and Belgian, which are neighbouring countries. In the Slovenian case the most common nationality was German, followed by Slovenian and French. The large proportion of nationals is a consequence of the COVID-19 measures worldwide, that prevented and discouraged travelling abroad. In Barcelona the tourist survey was held one year later, when fewer corona restriction were in place.

Table 7: Origin of the surveyed tourists per case study: either national (coming from the country in which the case study is located) or foreign.

Case study area	National (%)	Foreign (%)
AT	96	4
CZ	100	0
DE	97	3
EE	91	9
ES	9	91

Case study area	National (%)	Foreign (%)
GR	75	25
HU/SK	98	2
IL	93	7
IT	83	17
NL	49	51
PL	92	8
RO	98	2
SI	26	74
SK	87	13
UK	-	-

3.1.6.   Education

The educational systems differ between European countries. In order to be able to compare it somewhat, it was therefore decided to count the number of years of education and not to classify it by type of education.

Looking at the totals, 36 tourists (4%) have had less than 10 years of education. 19 tourists (2%) have had exactly 10 years. 19 tourists (2%) had 11 years of education and 67 tourists (7%) have had 12. 103 tourists (11%) have had 13 years of education, 41 tourists (4%) have had 14 years and 101 tourists (11%) have had 15 years of education. 537 tourists (57%) had 16 years or more of education. Summarizing, this basic information shows us that the educational level of the surveyed tourists is relatively high: 638 tourists (67%) have had 15 years or more education. The European trend according to Eurostat[2] is that over the years there are less early leavers of education. It is usual to have more educated people participating in a survey because they are more inclined to cooperate and more easily accessible than people with a lower social background and less education.

3.1.7.   Occupation

For our question about occupation we have made use of the 2018 Standard Occupational Classification (SOC) system. This is a common classification of occupational information for the UK[3]. In some countries the given classification groups for occupations were not known. In this situation people were asked directly for their occupation. The answers have been reclassified by the researchers into given occupational groups of the SOC system.

The survey only requested the occupation of the respondents. There was no categories for studying, or being retired or unemployed. In retrospect, this was a shortcoming in the survey. Some of the respondents (6%) did not answer the question, so no data were available. Some of the case studies developed their own categories for students, unemployed, volunteers and retirement. As not all case studies dealt with this in a similar way, it was decided to add a category 'other'.

The total view is that 89 (9%) of the respondents are managers. 333 (35%) respondents are categorized as professionals. 93 respondents (10%) are technicians, 68 respondents (7%) are clerical support workers, 87 (9%) of the respondents are service and sales workers and 8 respondents (1%) are skilled agricultural, forestry and fishery workers. 234 respondents (3%) are craft and related workers. 7 (1%) respondents are plant and machine operators and 30 respondents (3%) are working in elementary occupations. 154 answers (16%) can be attributed to the category 'other'.

3.1.8.   Household income

Some tourists prefer to keep information on income private, and requesting such information is considered as unpolite in some countries. In some countries it is even against national privacy rules. A substantial number of tourists from the Leichhardt Land (Germany), the Piedmont Landscape and Literary Park (Italy) and Ljubljana (Slovenia) did not answer the question: more than for the other case study areas. The question was not asked in the case study Media tourism in Scotland (United Kingdom).

160 respondents (17%) have a total gross household income per year of less than €10.000. 199 respondents (21%) have a total gross income per year between €10.000 and €20.000. 208 respondents (23%) have a total gross income per year between €20.000 and €40.000. 109 respondents (11%) have a total gross income per year between €40.000 and €60.000. 55 respondents (6%) have a total gross income per year between €60.000 and €80.000. 18 respondents (2%) have a total gross income per year between €80.000 and €100.000 Euro and 18 respondents (2%) have a total gross income per year between €100.000 and €120.000 Euro. 29 respondents (3%) have a total gross income per year above €120.000. In other words, 567 respondents (60%) have an income below €40.000.

Tourists (>20% or more) of the following case studies show an income below €10.000: Nitra (Slovakia) with 42 out of 112 tourists (37.5%), South Moravia (Czechia) with 13 of 40 tourists (32.5%). This is followed by the city of Komárom/Komárno (Hungary/Slovakia): 25 of 96 tourists (26%), Buzău Carpathians and Subcarpathians (Romania) with 15 out of 64 tourists (23.4%), Piedmont Landscape and Literary Park: 9 out 0f 41 tourists (22%), Kinderdijk (The Netherlands): 6 out of 29 (20.6%), the Cyclades (Greece): 15 out of 79 tourists (18%), The Valley of Palaces and Gardens (Poland): 10 out of 56 tourists (17.9%), and Styrian Iron Route (Austria): 5 out of 29 tourists (17.2%). So we see that in 8 case studies around 20% or more of the tourists have an income below 10.000 Euro.

It is interesting to see that such low-income tourists still do spend money to visit cultural tourism attractions. If these tourists are students and other young people (which we could not check), this would definitely mean a potential public for cultural tourism also in their later careers.

3.1.9.   Household composition

153 (16%) of the respondents live alone. 335 (35%) people live together with another person. 179 people (19%) live in a household of three persons and 159 people (18%) live in a household of four persons. 56 people (6%) live in a household of five people and 25 people (3%) live in a household of more than 5 people.

Out of every ten tourists, nine have a household composition of 1 to 4 people. Couples are most common, followed by 3 and 4 persons, and single person households respectively. This corresponds with data of Eurostat[4] about the European average size of 2.3 persons in 2016.

Striking deviations in the size of the household composition are the cases which show a relatively large household of five or more members: in Beit-She'an Valley (Israel) this is the case for 16 out of 42 tourists (38%), for Ljubljana (Slovenia) this is the case for 15 out of 89 tourists (17%) and in Nitra (Slovakia) 19 out of 128 tourists come from a household of five plus members (15%).

3.1.10.   Travel group composition

Most of the respondents, 340 (36%), are travelling in a pair (two people). After, the most popular way of travelling is with family. This counts for 245 respondents (26%). This is followed by travelling in a self-organized group (213 respondents; 22%), and travelling alone (109 respondents; 11%). Travelling with an organized group occurred in 15 cases (2%) and the occurrence of travelling with co-workers or business partners is even lower: only 8 respondents. 13 people are into the category other. Other options mentioned

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were for example multiple group compositions during the trip, or school trips, which should actually be included in the category organized group travel.

Zooming in on the case studies we see that seven of them showed a more than average number of tourists traveling alone or in a pair: Kinderdijk (The Netherlands) 35 out of 45 tourists (78%); city of Komárom/Komárno (Hungary/Slovakia) 57 out of 99 tourists (57.5%), Media tourism in Scotland 21 out of 40 tourists (52.2%), the Piedmont Landscape and Literary Park (Italy) 24 of 46 tourists (52%), Barcelona (Spain) 29 out of 56 tourists (51.8%), the Cyclades (Greece) 40 of 78 tourists (51.2%) and Ljubljana (Slovenia) 50 of 100 tourists (50%). The other case studies had a more balanced distribution among the group compositions.

3.2. Day trips to other areas or countries

The question about day trips was only answered by those staying overnight in the case study area. 225 respondents made no day trips to other areas (40.8%). Results for the case studies are shown in Figure 5. When we consider the number of day trips, a diverse and thus divided picture emerges of 1 to 5 day trips: 67 respondents (12%) make one day trip to another area during their stay, 86 respondents (16%) make 2 day trips, 59 respondents (11%) make 3 day trips, 22 respondents (4%) make 4 day trips and 72 respondents (13%) make 5 day trips.
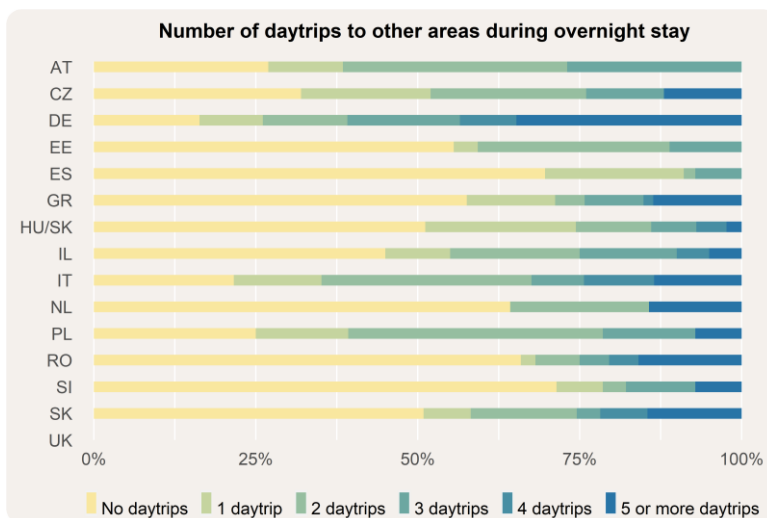
Figure 5: Number of daytrips to other areas during an overnight stay.

When comparing the case studies, the following cases show a relatively small number of day trips to other areas: Ljubljana (Slovenia): 20 out of 28 respondents stated no day trips, Kinderdijk (The Netherlands): 9 out of 14 respondents answered no day trips, the Buzău Carpathians and Subcarpathians (Romania): 29 out of 44 did not make any day trips, and Barcelona (Spain): 39 out of 56.

807 tourists (85%) visited zero other countries before, during or after their stay in the case study areas (Table 8). Of the tourists that did combine their visit, 59 tourists (6.6%) visited one other country, 20 tourists (2%) visited two other countries, 15 tourists (1.6%) visited three other countries, 6 tourists (0.6%) visited four countries and 12 tourists (1.3%) visited five or more other countries. The high share of tourists not combining their visit with trips to other countries can probably be explained by the fact that in most case studies most of the tourists were nationals, traveling within their own country.

Table 8: Percentage of tourists that did not combine their visit with trips to other countries.

Case study area	No trips abroad (%)
AT	95
CZ	75
DE	94
EE	89
ES	79
GR	91
HU/SK	84
IL	100
IT	90

Case study area	No trips abroad (%)
NL	88
PL	98
RO	97
SI	67
SK	88
UK	-

In South Moravia (Czechia) and in Ljubljana there are more than average tourists that visit one or more countries: ten out of forty tourists (25%) in South Moravia and 28 out of 100 (28%) in Ljubljana. In Barcelona, 21% of tourists visited combined their trip with one or more other countries. In the Ljubljana case study, as well as in Barcelona, most of the interviewed tourists were not Slovenian nationals but this does not apply for the Czech case study, where a 100% of the surveyed was Czech.

3.3.   Average tourist expenditure

Most of the tourists spend between 0 and 50 euros per person per day (Figure 6). In the Beit-She'an Valley (Israel) tourist spend considerably more, and to a lesser extent in the Piedmont Landscape (Italy), Media tourism in Scotland (United Kingdom) and Barcelona (Spain) as well. It is possible that expenditure is lower due to the high proportion of tourists traveling within their own country, as a consequence of the COVID-19 pandemic. For those countries with a currency different than the euro (Czechia, Hungary/Slovakia, Israel, Poland and Romania) values were converted to the euro by the researchers of those case studies.
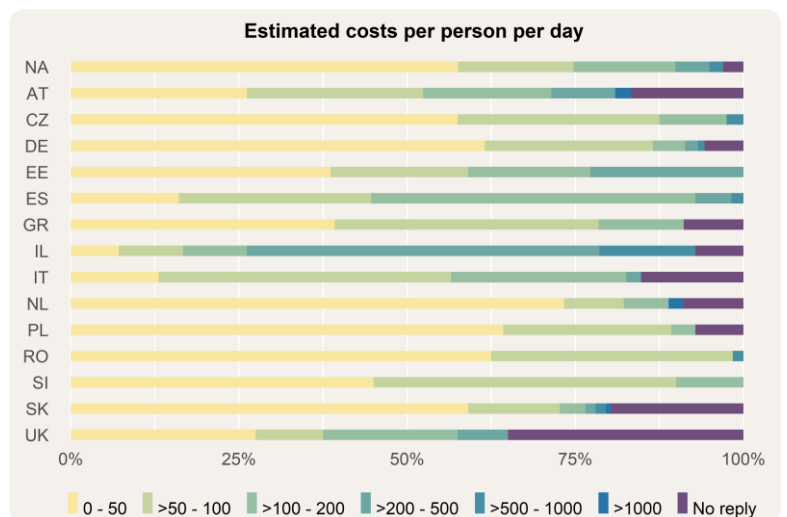
Figure 6: Estimated costs per person per day, in euros.

3.4.   Accommodations used by tourists

The share of tourists taking a daytrip to the case study area, or that stay for one or multiple nights is quite equally divided for seven of the case studies (Table 9). For others, the share of overnight stays is much higher than the share of day-trippers. For example, in the Cyclades (Greece) almost a 100% of tourists stay overnight. This is of course easily explained by the fact that travelling to an island takes time and thus will have to be combined with an overnight stay. Tourists also stay on the islands for multiple nights, over 50% stays 5 nights or more (Figure 7, left). Tourists also stay mostly overnight in Barcelona, Spain, and they usually stay for multiple nights: over 50% stays at least four nights. Tourists of the Leichhardt Land (Germany) and the Piedmont Landscape and Literary Park (Italy) also have relatively large shares of overnight stays. Tourists in the Leichhardt Land stay long, again over 50% stays 5 nights or more. In the Italian Piedmont Landscape shorter trips are more common, most tourist stay one or two nights. The Buzău Carpathians and Subcarpathians (Romania) and Ljubljana (Slovenia) also have a larger share of overnight tourists. The Dutch case study of Kinderdijk has the largest share of day-trippers, with 80% of the tourists only visiting the case study area for the day. This can be explained by the lack of accommodations in the case study area and the fact that bigger Dutch cities such as Rotterdam and Amsterdam, but also Belgian cities, are relatively close by. Those that do stay mostly stay 1 or 2 nights.

Table 9: Percentage of surveyed tourists visiting the case study area for a daytrip, or for an overnight stay of one or multiple nights.

Case study area	Daytrip (%)	Overnight (%)	No reply (%)
AT	47.6	52.4	
CZ	40.0	60.0	
DE	10.6	89.4	
EE	38.6	61.4	
ES	3.6	96.4	
GR	2.5	97.5	
HU/SK	55.6	44.4	
IL	52.4	47.6	
IT	15.2	84.8	
NL	80.0	17.8	2.2
PL	44.6	55.4	
RO	31.3	68.8	
SI	29.0	69.0	2.0
SK	55.3	43.2	1.5
UK	-	-	-
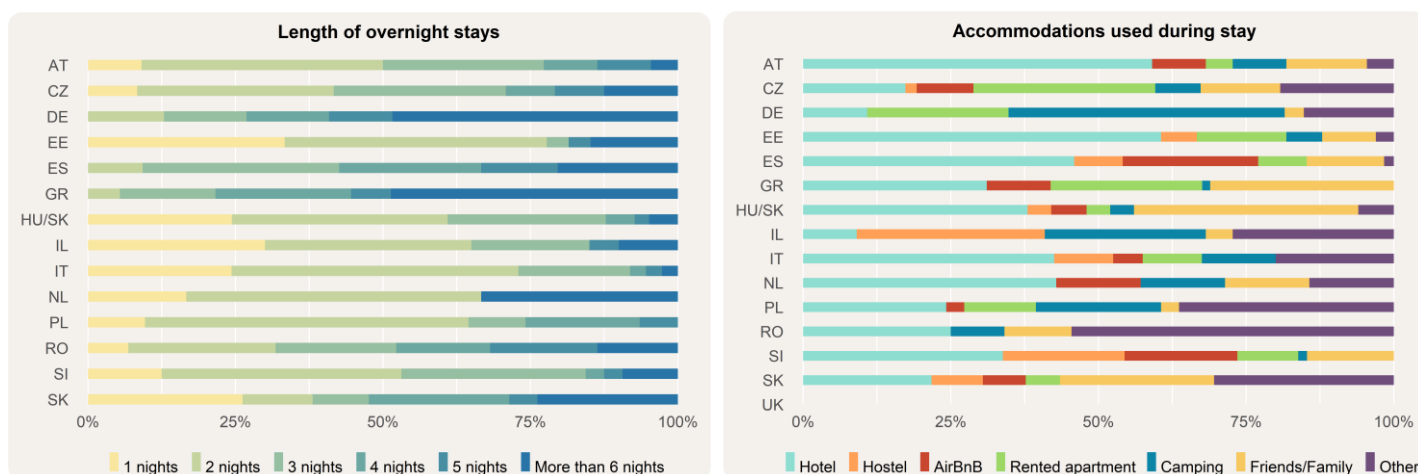
Figure 7: Length of overnight stays of the surveyed tourists (left) and accommodations used by the surveyed tourists (right).

The accommodations used by the tourists are quite different per case study (Figure 7, right). The category 'other' is also quite big for some case studies, indicating that the categories used in the survey were perhaps not sufficient. Hotels are for most case studies the largest category, especially in the Styrian Iron Route (Austria) and Ida-Virumaa (Estonia). Hostels are less common in the case studies, except for the Beit-She'an Valley (Israel), where the tourists used hostels more than hotels. Camping is also popular here, as it is in the Leichhardt Land as well. Staying with friends and family is also a common used option, especially in the Cyclades, and Komárom/Komárno (Hungary/Slovakia). AirBnB accommodations are most used in Barcelona, Ljubljana and Kinderdijk. The category 'other' is very large in the Buzău Carpathians and Subcarpathians, Valley of Palaces and Gardens (Poland) and Nitra (Slovakia). In Slovakia 'student dorms' were often mentioned, which at the same time also explains the relatively large share of respondents staying 6 nights or more (Figure 7, left). Respondents in Romania often put 'guesthouse' as their accommodation. For the Polish case study, the 'other' category consists of farm accommodations and mountain lodges. These categories were asked in the survey, but not included in the plot as they were rarely chosen in most other case studies. Farm accommodation do account for part of the respondents in 'other' in the Israeli and Italian case studies as well.

3.5. Obtaining information about the area

The most used methods of obtaining information over all case studies were search engines and other people (Table 10). All case studies except Komárom/Komárno city (Hungary/Slovakia) have this as their first or second most chosen option. However, search engines is a very broad concept that could lead to all kinds of websites so this should probably have been further divided in multiple categories. In Komárom/Komárno social media was the most chosen method of obtaining information (search engines were in third place). Social media was also often chosen by the respondents in almost all case studies (except for the Leichhardt Land in Germany), but was usually not among the top 2. Respondents in the German case study also often make use of brochures/posters and tourists information centres, methods that are not very common in the other case studies. A possible explanation for the preference for these, more classical, methods of obtaining information could be the relatively higher age of the respondents in the Leichhardt Land (see section 3.1.4). Options that were not often chosen (5% or less of the total) were travel guides and agencies, tourism fairs and tourist information centres. Tourism fairs were however a large source of information for the Austrian case study: the Styrian Iron route, and tourist information centres in the case study Media tourism in Scotland (United Kingdom).

Table 10: Used methods of obtaining information, in percentages of the total of answers given per case study (respondents could check multiple options). Last row in table (Total) is percentage of the number of answers per category, from the total of answers given. Highlighted in green the highest values (darker green) and the second highest value (lighter green) per case study.

Case study area	Search engines	Travel guides	Travel agencies	Brochures/posters	Other people	Social media	TripAdvisor	Accommodation	Tourism fairs	Tourist information centre	Other
AT	36	3	3	5	0	14	8	5	22	4	0
CZ	38	3	1	6	19	13	9	6	0	5	1
DE	34	2	0	21	7	2	1	8	0	16	7
EE	31	6	1	7	25	19	4	4	0	2	1
ES	28	10	1	2	27	14	11	2	0	2	2
GR	25	6	7	2	19	19	7	2	11	1	1
HU/SK	19	3	1	8	24	26	9	1	2	5	2
IL	41	7	1	4	20	13	1	1	0	1	10
IT	39	5	1	4	16	14	6	4	0	4	8
NL	40	8	0	4	15	13	7	0	1	7	4
PL	30	11	2	0	31	13	1	11	0	0	1
RO	32	5	1	4	27	19	1	2	1	3	5
SI	38	9	0	3	19	13	6	4	1	2	5
SK	31	3	1	5	2	9	18	18	6	5	2
UK	30	11	0	10	13	9	2	0	6	16	2
Total	31	6	2	6	16	14	8	6	4	5	3

3.6. Accessibility of the area

Average rating scores given by tourists on accessibility to the area from outside are good (Table 11, left). Respondents are very positive about accessibility, with all but two case studies scoring larger than 4. Only Nitra (Slovakia) and the Styrian Iron Route in Austria got a rating between 3 and 4. Accessibility within the

area scores a bit lower for most case studies (Table 11, right). Especially the Buzău Carpathians and Subcarpathians (Romania) and the Greek Cyclades received a rating of 0.8 and 0.8 points lower respectively. For other case studies average ratings do not differ much.

Table 11: Average accessibility rating given by tourists to the area from outside (left) or within the case study area (right) from a rating of 1 (very difficult) to 5 (very easy). Averages calculated over the respondents that answered the question, per case study. Case studies are ordered by their descending average ratings.

From outside		Within	
Case study area	Average rating	Case study area	Average rating
IT	4.7	ES	4.4
GR	4.6	IT	4.4
RO	4.5	NL	4.4
IL	4.4	IL	4.4
HU/SK	4.3	SI	4.2
PL	4.3	DE	4.2
DE	4.3	HU/SK	4.1
ES	4.2	PL	4.0
SI	4.2	CZ	4.0
NL	4.1	EE	3.9
CZ	4.1	GR	3.8
EE	4.1	RO	3.6
SK	3.5	SK	3.4
AT	3.1	AT	2.9
UK	-	UK	-

For almost all case studies the most common transportation method used to travel to the case study is 'own transport' (Figure 8, left). Only in Komárom/Komárno city (Hungary/Slovakia), South Moravia (Czechia), Barcelona (Spain) and the Cyclades this was not the case. In the Cyclades there were no respondents travelling with own transport, which is of course logical as the Cyclades are islands. The large use of own transport can of course be easily explained by the fact that most tourists were nationals. Also, it is likely that other types of transport were limited due to the COVID-19 pandemic. Public transport and organized tours were also common methods to get to the case study areas. Travelling by bicycle was a common method in Komárom/Komárno city. Arriving by airplane was only much used in Barcelona, a result of the large share of foreign tourists visiting this case study area.
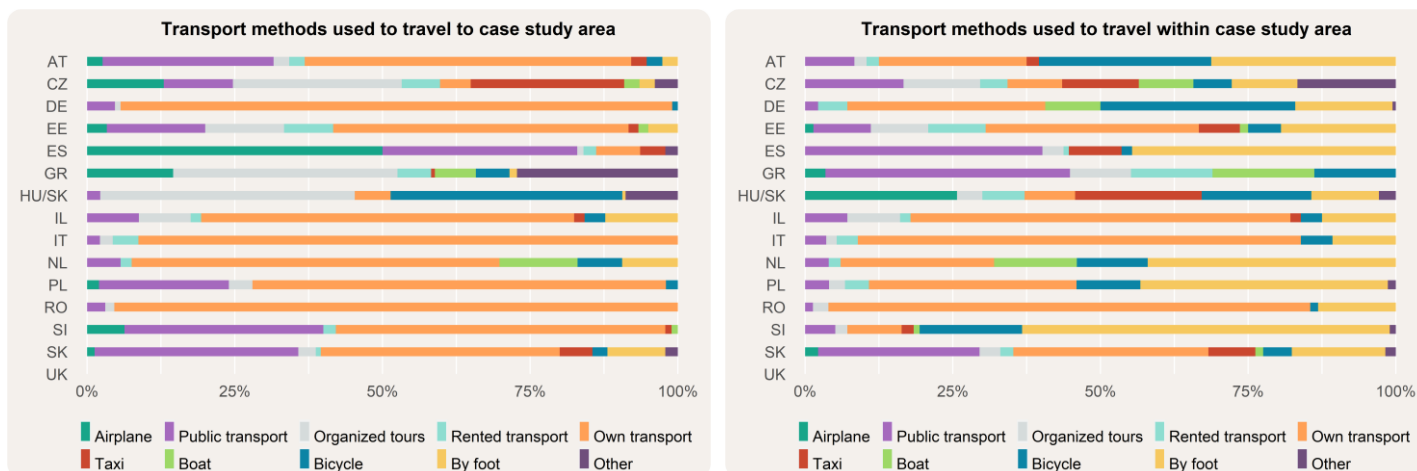
Figure 8: Transportation methods used to travel to the case study area (left), and to travel within the case study area (right).

Travelling within the case study areas was also often done with own transportation (Figure 8, right). Walking, and to a lesser extent biking, was also a common method of getting around the area. The use of public transport was also quite common, especially in the Cyclades, Barcelona and Nitra. Although organized tours were a common method to get to a case study area, they were used less to get around within the area. Travelling by airplane was a common method of getting around within the area in Komárom/Komárno, according to respondents. This was surprising and cannot be explained fully, as there is only private transfer possible in the area.

3.7. Motivations to visit the area

By far the most chosen motivation to visit the case study areas was 'nature/landscapes' (Figure 9). For all case studies except the Greek Cyclades and Barcelona (Spain), 'nature/landscape' is among the top 3 of most chosen motivations. The second most chosen motivation is 'local traditions/culture', in nine out of fifteen case studies this motivation is in the top 3, indicating that the tourists visiting the case studies are usually very interested in local culture. Although not among the three least chosen, tourists were not interested in local traditions and culture in the Beit-She'an Valley (Israel) and less interested in the Styrian Iron route (Austria) and Valley of Palaces and Gardens (Poland). Another two of the most chosen motivations are 'architecture/townscapes' and 'gastronomy/food festivals'. This was not the case in all case studies however. Gastronomy is among the least chosen motivation in Kinderdijk (The Netherlands) and Media tourism in Scotland (United Kingdom) and few tourists chose gastronomy as a motivation in some other case studies as well. Worth mentioning here is the Beit-She'an Valley, where only one tourist gave gastronomy as a motivation to visit. Architecture and townscapes were among the least chosen motivations in the Cyclades and the Buzău Carpathians and Subcarpathians (Romania), and again only one tourist was motivated by this in the Beit-She'an Valley. Quite some tourists said 'beach' was a motive to visit the place. This was among the top 3 in the Cyclades and the German Leichhardt Land. It was also in the top 3 in the Beit-She'an Valley, due to the presence of riverbank 'beaches'. 'Classical' cultural tourism such as museums and art galleries were only in the top 3 in Ida-Virumaa (Estonia) and Barcelona.

Among the least chosen motivations are 'health', 'business/work', 'film/theatre/literature' and 'festival(s) and/or nightlife'. However, for Nitra (Slovakia), film, theatre and/or literature were an important motivation to visit. Also, 'festival(s) and/or nightlife' is among the top 3 in this case study. Sport was not an often chosen motivation overall, but is still in the top 3 for three case studies: the Styrian Iron Route, the Leichhardt Land and Valley of Palaces and Gardens. Religion was not an important motivation in most case studies, being among the least three for eight out of thirteen case studies. Only for tourists in the Cyclades, this was an important motivation to visit the case study area. This can be explained by Greek tourists celebrating religious holidays on the islands.

3.8. Cultural tourism

3.8.1. Interest in visiting cultural attractions

Tourists were asked to state how interested they were in visiting a number of cultural attractions, sites and events on a scale from not interested at all to very interested. Results can be viewed in Table 12 (three cultural offers in which tourists were most interested) and Table 13 (three cultural offers in which tourists were least interested). An important note with these results: from the case study reports it seemed that several teams interpreted the question as 'satisfaction with cultural attractions, sites and events'. If the question has indeed been asked like this to tourists in their case study areas this will have influenced the results, as the meaning of the question changed.
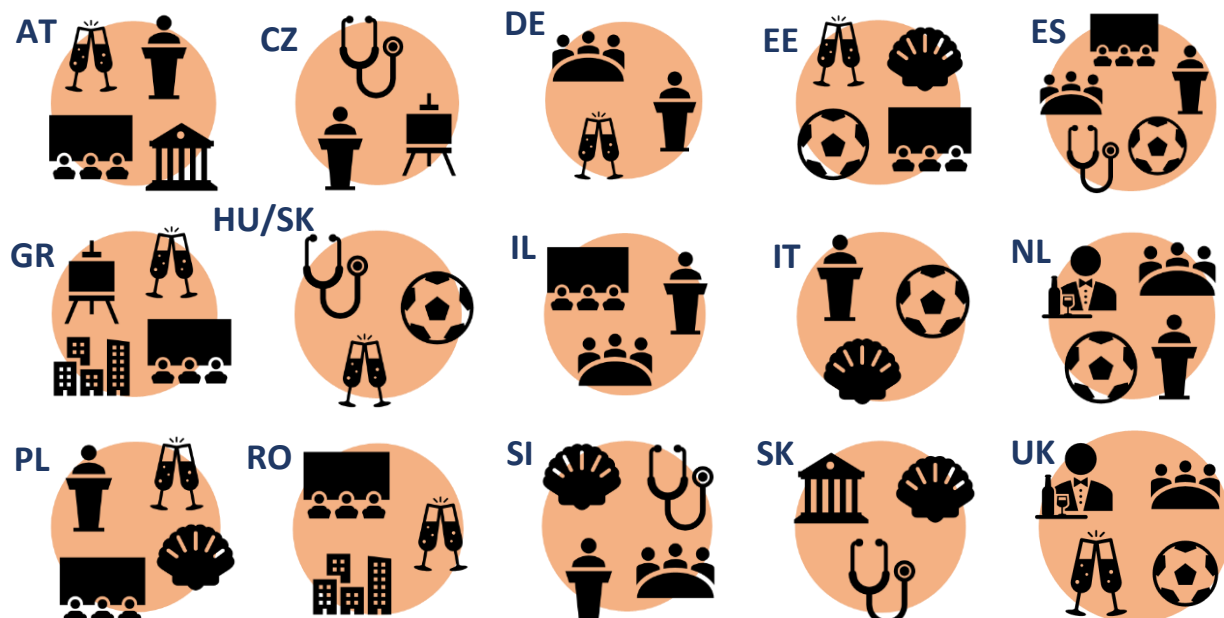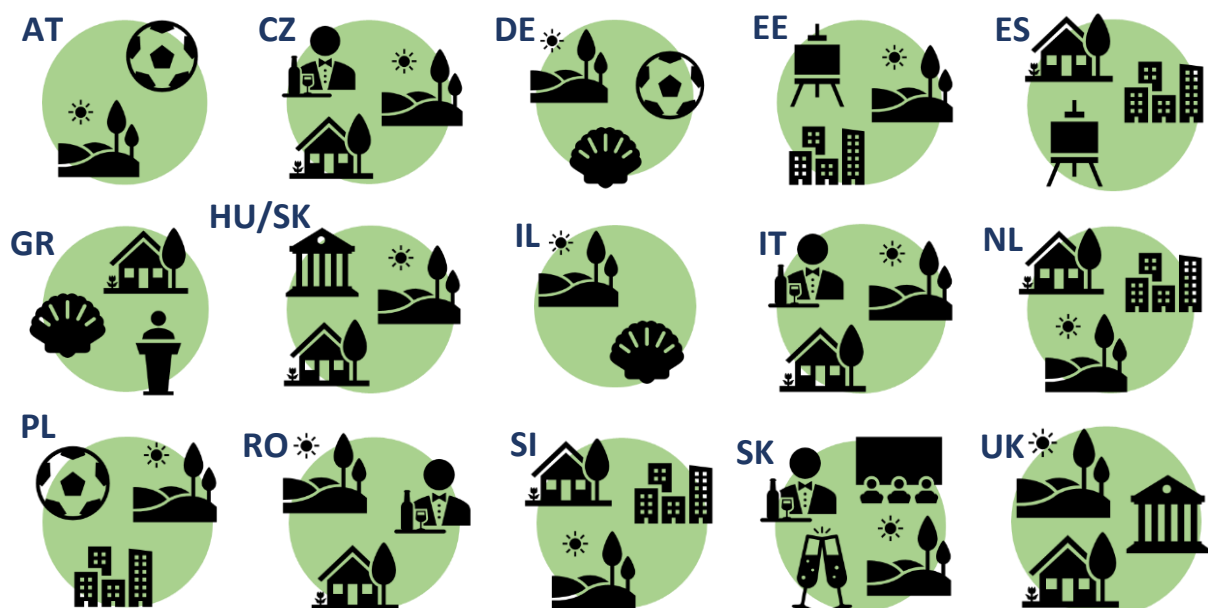
Figure 9: Three most and three least important motivations to visit the case study areas, according to tourists. Most important factors in green circle, least important in orange circle. Number of factors per circle can differ depending on the results.

Overall, tourists were most interested in the categories 'historical sites and buildings', 'restaurants/food festivals' and 'cultural heritage sites and buildings'. Also, 'townscapes' and 'cultural routes' are often in the top 3. The categories 'sports events', 'religious sites/events' and 'dance events' were the least interesting categories over all case studies. The categories 'film/theatre' and 'art galleries' are also often found among the three least interesting cultural attractions to tourists, although tourists in Nitra (Slovakia) were interested

in film/theatre, as this category was in the top three in this case study. Health sites such as spas and hot springs are only in the top three for the Beit-She'an Valley (Israel). Tourists are generally also not very interested in visiting museums, these can only be found in the top 3 in Ida-Virumaa (Estonia) and Media tourism in Scotland (United Kingdom). These results correspond very well to the motivations in visiting the case study areas (Figure 9). However, tourists in the Leichhardt Land (Germany) were motivated by sports to visit the area, but were not interested in sport events. Also, tourists in Greece had religious motives to visit the Cyclades, but were not interested in religious sites/events. For these cases, results did not correspond.

*Table 12: Three cultural tourism offers in which tourists were **most** interested in visiting. Choices were: museums, art galleries, historical sites and buildings, cultural routes, townscapes, (film) theatre, cultural heritage sites and buildings, restaurants/food festivals, music events (concerts/festivals), dance events, local traditions/folklore, religious sites/events, sports events, health sites (e.g. spas/hot springs)*

Case study area	Offer 1	Offer 2	Offer 3
AT	Townscapes	Historical sites and buildings	Restaurants/food festivals
CZ	Restaurants/food festivals	Cultural heritage sites and buildings	Local traditions/folklore
DE	Restaurants/food festivals	Townscapes	Historical sites and buildings
EE	Cultural heritage sites and buildings	Historical sites and buildings	Museums; townscapes
ES	Historical sites and buildings	Cultural heritage sites and buildings	Townscapes
GR	Restaurants/food festivals	Historical sites and buildings	Local traditions/folklore
HU/SK	Historical sites and buildings	Townscapes	Restaurants/food festivals
IL	Health sites (e.g. spas/hot springs)	Cultural routes	Historical sites and buildings
IT	Restaurants/food festivals	Cultural heritage sites and buildings	Cultural routes
NL	Cultural heritage sites and buildings	Restaurants/food festivals	Townscapes
PL	Cultural routes	Historical sites and buildings	Cultural heritage sites and buildings
RO	Historical sites and buildings	Cultural routes	Cultural heritage sites and buildings
SI	Townscapes	Historical sites and buildings	Cultural heritage sites and buildings
SK	Historical sites and buildings	Restaurants/food festivals	Film/theatre
UK	Museums	Cultural heritage sites and buildings	Historical sites and buildings

*Table 13: Three cultural tourism offers in which tourists were **least** interested in visiting. Choices were: museums, art galleries, historical sites and buildings, cultural routes, townscapes, (film) theatre, cultural heritage sites and buildings, restaurants/food festivals, music events (concerts/festivals), dance events, local traditions/folklore, religious sites/events, sports events, health sites (e.g. spas/hot springs).*

Case study area	Offer 1	Offer 2	Offer 3
AT	Art galleries	Film/theatre	Museums
CZ	Sport events	Religious sites/events	Art galleries

DE	Art galleries	Film/theatre	Sport events
ES	Sport events	Film/theatre	Dance events
EE	Sport events	Dance events	Religious sites/events
GR	Sport events	Religious sites/events	Film/theatre
HU/SK	Religious sites/events	Dance events	Sport events
IL	Religious sites/events	Film/theatre	Dance events
IT	Sport events	Film/theatre	Dance events
NL	Religious sites/events	Dance events	Sport events
PL	Film/theatre	Religious sites/events	Dance events
RO	Dance events	Sport events	Music events (concerts/festivals)
SI	Sport events	Religious sites/events	Health sites (e.g. spas/hot springs)
SK	Sport events	Religious sites/events	Health sites (e.g. spas/hot springs)
UK	Dance events	Health sites (e.g. spas/hot springs)	Music events (concerts/festivals)

3.8.2. Tourist satisfaction with visit
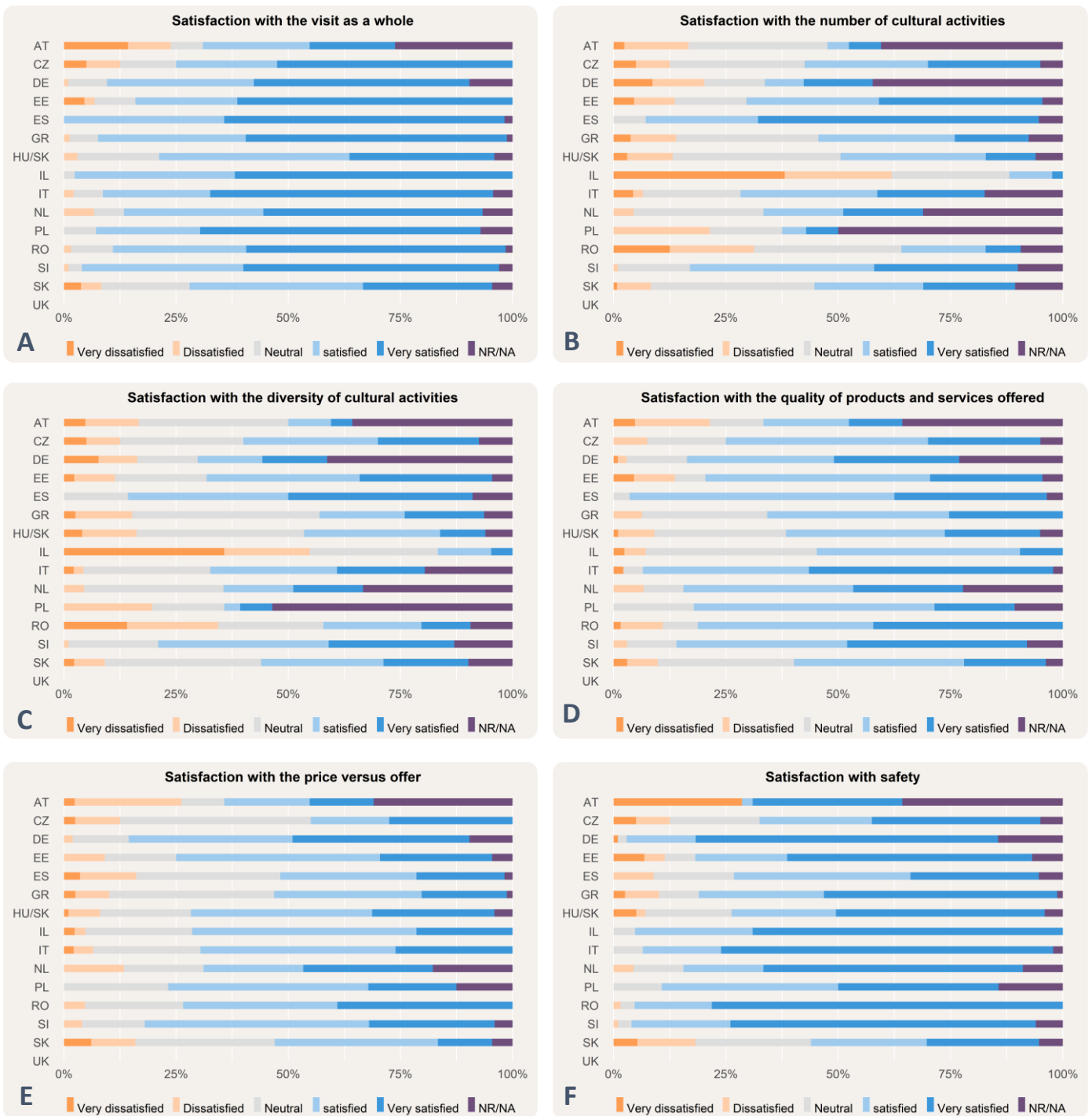
Figure 10: Tourist satisfaction for the visit as a whole (A), the number of cultural activities (B), the diversity of cultural activities (C), the quality of products and services offered (D), price versus offer (E), and safety in the case studies (F), on a scale of very dissatisfied to very satisfied. NR/NA are the non-reply answers combined with the category 'not applicable'.

Tourists are usually very satisfied for all case studies with the visit as a whole (Figure 10A). For all case studies, over 50% of tourists stated that they were satisfied or very satisfied with their visit. In Barcelona (Spain), all tourists that replied were (very) satisfied. For the Austrian case study, the Styrian Iron Route, about 25% of the tourists were (very) dissatisfied with their visit. This is the highest for all case studies. Regarding satisfaction with the number of cultural activities (Figure 10B) and satisfaction with the diversity of cultural activities (Figure 10C), the combined category 'not applicable' and 'no reply' was high for several case studies. Also, many respondents stated 'neutral' for these questions. This could be an indication that there is a lack

of cultural activities (hence the 'not applicable') or that the questions were not well understood. Other than this, tourists were most satisfied with the number and diversity of cultural attractions in Barcelona and Ljubljana (Slovenia). Tourists were most dissatisfied in the Beit-She'an Valley (Israel). Overall, tourists were quite satisfied with the quality of the products and services offered in the case study areas (Figure 10D). Tourists were most divided in the Styrian Iron Route, with the division of respondents that answered the question around 50-50% for the lowest and highest two categories. Tourists were most satisfied in Barcelona and the Piedmont Landscape and literary park (Italy). Satisfaction with price versus offer was also quite high (Figure 10E). Lowest satisfaction is seen again in the Styrian Iron Route, were tourists are very divided in their responses. Also in Barcelona tourists were among the least satisfied, especially considering their satisfaction with the previous statements, for example on quality of products and services. Safety is experienced quite high in all case studies (Figure 10F), albeit a bit lower in the Styrian Iron Route (respondents are divided around 50-50% on this question) and Nitra (Slovakia).

3.8.3. Factors influencing the decision to visit a cultural attraction

Personal interest was the most important factor influencing the decision to visit a cultural attraction, site or event or not, and is in the top three most chosen factor for all case studies except the Leichhardt Land in Germany and the Cyclades in Greece (Table 14). Price was also among the most important, except in the Piedmont Landscape and literary park (Italy), Kinderdijk (The Netherlands), Valley of Palaces and Gardens (Poland) and Barcelona (Spain). The third most important factor over all case studies was the location of an attraction. This was in the top three for ten case studies. Recommendation by other people came fourth, this was very important in six case studies, but not as important in the Styrian Iron Route (Austria), the Cyclades, and the Beit-She'an Valley (Israel). Physical accessibility was very important to tourists in the Leichhardt Land and the Cyclades. Least important factors were 'tourist card offer', 'inclusion in organized package' (although this was among the top three in the Beit-She'an Valley), and social media. Recommendation by accommodation was also not very important in most case studies, except for the Cyclades, where it was the most important factor.

Table 14: Three most important (most chosen) factors influencing the decision to visit a cultural attraction, site or event per case study area. Choices were: price, location, personal interest, physical accessibility, social media, tourist card offer, recommendation by accommodation, recommendation by other people, inclusion in organized package or 'other').

Case study area	1st motivation	2nd motivation	3rd motivation
AT	Personal interest	Location	Price
CZ	Personal interest	Location	Price
DE	Physical accessibility	Price	Recommendation by other people
EE	Personal interest	Location	Price
ES	Personal interest	Recommendation by other people	Location
GR	Recommendation by accommodation	Price	Physical accessibility
HU/SK	Personal interest	Price	Recommendation by other people
IL	Personal interest	Price	Inclusion in organized package
IT	Personal interest	Recommendation by other people	Location
NL	Location	Personal interest	Recommendation by other people
PL	Personal interest	Recommendation by other people	Location
RO	Location	Personal interest	Price
SI	Personal interest	Price	Location
SK	Personal interest	Price	Location
UK	-	-	-

3.8.4. Recommendation to others

Over 50% of tourists are likely or very likely to recommend visiting the case study areas to others (Figure 11). In eight out of fourteen case studies, there were not even respondents stating very unlikely or unlikely to give a recommendation. Categories 'very unlikely' and 'unlikely' to give a recommendation were highest (around 10%) in the Styrian Iron Route (Austria).
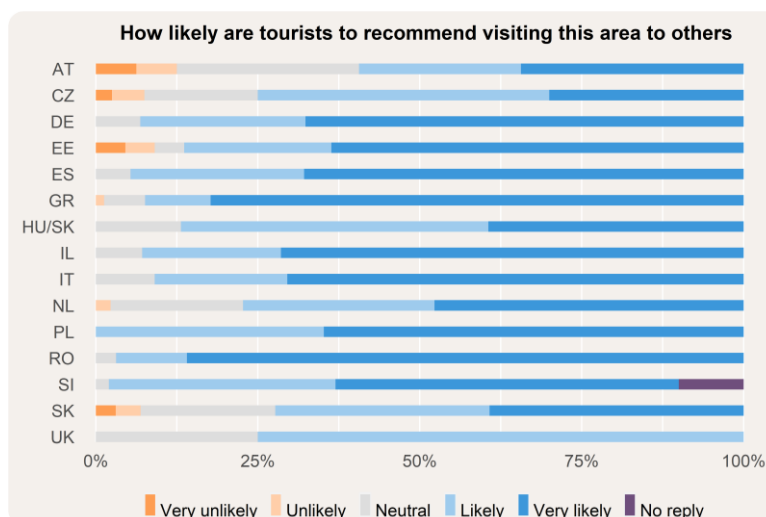
Figure 11: Likelihood of tourists to give a recommendation to visit the area to others.

3.9. Missing facilities

The question about missing facilities was an open one. Several case studies stated in their report that the number of responses was limited, and therefore the results based on only a small sample. However, from the responses some common topics can be seen over all case studies.

- The first one is information and communication. In almost all case studies respondents stated a lack of information offered to tourists, and a lack of proper communication of information to tourists (such as advertising and promotion of sites and activities).
- Another commonly mentioned topic that should be improved is infrastructure and accessibility, such as road connections and public transportation. This is not in correspondence with how accessibility in the area was rated (section 3.6 and Table 11), indicating that perhaps the question on accessibility was not well understood. An important part of accessibility that was mentioned in several case studies is the lack of proper cycle paths.
- According to tourists in several case studies there is also a lack of restaurants or a very limited offer of food in the restaurants. The lack of a vegetarian/vegan offer was also specifically commented.
- Lastly, a lack of attractions for children and families was also mentioned in multiple case studies.

3.10. Tourists and COVID-19

In general, the way of travel changed substantially for the surveyed tourists (Figure 12). In most case studies, the majority of respondents stated that the way of travel changed at least 'somewhat', if not (very) much. Tourists in the Beit-She'an Valley (Israel) stated the most change, and the highest share of tourists stating (very) little change was in Komárom/Komárno city (Hungary/Slovakia). The different results per case study could be a result of national COVID-19 measures, that differed per country.

However, on the whole, way of travel was impacted by COVID-19. Changes that tourists in most case studies commented on were avoiding traveling abroad, and instead traveling domestic. Tourists felt restricted in choosing a destination and took fewer trips, but many also mentioned that they discovered new places within their own countries. The length of the holidays was also frequently commented on, with tourists stating that they take shorter holidays.

Another common theme among the case studies is that tourists avoided large masses, instead choosing to visit less frequented places and sights. They prefer to avoid public transportation, instead using more own transport, or rented vehicles. Feeling 'anxious' or 'insecure' during traveling was also mentioned in several case studies. Tourists took health precautions during their trip, such as wearing masks and using hand sanitizer.

In Barcelona (Spain), were the surveys were conducted a year later, results were a bit different. Several respondents state there is a lot of paperwork and rules involved in visiting places and sights. Also, many mention the (obligatory) mask. Also in the case study

Figure 12: Change in way of travel due to corona.

Media tourism in Scotland (United Kingdom) the survey was conducted a year later. Visitors mention they would normally take trips abroad, and travel is now done more by car, as opposed to public transport.

The share of tourists that has visited the case study areas before is high (Table 15). This is probably a result of the large proportions of domestic tourists (see section 3.1.5). Only in Kinderdijk (The Netherlands), Ljubljana (Slovenia) and Barcelona 13%, 35% and 41% has visited the area before respectively. These case studies also had the highest shares of non-domestic respondents, especially Barcelona. However, in Kinderdijk 50% of respondents were from The Netherlands, indicating that the Dutch tourists do not frequently visit Kinderdijk, despite it being in their own country. Tourists visiting Nitra (Slovakia) had most often visited the area before.

Table 15: Percentage of tourists that visited the area before.

Case study area	Previous visit (%)
AT	64
CZ	60
DE	61
EE	89
ES	41
GR	72
HU/SK	72
IL	88
IT	59
NL	13
PL	55
RO	63
SI	35
SK	95
UK	-

Figure 13: Difference in current experience compared to previous visit to the case study areas.

Those tourists that had travelled to the case study area before, also answered questions about the differences in their experience of the visit, comparing the current visit (in COVID-19-time) with the previous one(s). The same six statement were surveyed as in section 3.8.2: so the visit as a whole, satisfaction with

number and diversity of cultural activities, quality of products and services offered, price versus offer and safety. For all case studies, and for all six statements, on average experiences did not appear to differ between the current and the previous visit.

The last question of the survey asked respondents to compare the current and previous visit(s) in one statement, choosing between: 'no difference in experience', 'experience was better before', 'experience is better now' and 'I cannot say'. The results of this question (Figure 13) confirm the results on average experiences. There is no clear tendency towards 'better now' or 'better before' visible. Many respondents stated 'no difference in experiences'. The number of respondents stating 'I cannot say' is also quite large for all case studies, indicating that respondents found it difficult to compare the visits.

4. Resident survey results

4.1. Profiles of the residents

For the surveys, samples were taken from the resident population in the case studies. Within a sample, the aim is usually to represent a distribution of profile characteristics of residents (e.g. over gender, age, country of origin, education, occupations, income, household compositions and place of residence) that corresponds as closely as possible to the population composition in the case study areas. For some case studies, the sample of residents is more representative of the residents in the case study area than for other case study areas.

In this section we describe the average profile of the residents and which characteristics occur most often when all case studies are considered summarized. The case studies that strongly deviate from the average will be mentioned.

4.1.1. Number of surveyed residents

The total number of residents participating in the survey for residents is 1747 (Table 16). The lowest number participating in the survey for residents per country or case study was 40. The highest number participating in the survey for residents per country or case study is 400. In seven case studies, the number of residents who completed the survey was two to ten times more than the required minimum of 40 respondents: between 80 and 400 respondents in the Leichhardt Land (Germany), Ida-Virumaa (Estonia), the Cyclades (Greece), Komárom/Komárno (Hungary/Slovakia), the Piedmont Landscape and Literary Park (Italy), the Beit-She'an Valley (Israel), Ljubljana (Slovenia) and Nitra (Slovakia).

Table 16: Total numbers of respondents participating in the survey for residents per case study (N=1747).

Case study area	Code	N
Styrian Iron Route	AT	41
South Moravia	CZ	40
Leichhardt Land	DE	85
Ida-Virumaa	EE	103
Art Nouveau in Barcelona	ES	40
The Cyclades	GR	136
Komárom/Komárno	HU/SK	103
Beit-She'an Valley	IL	135
Piedmont Landscape and Literary Park	IT	400
Kinderdijk in the Water Triangle	NL	45
Valley of Palaces and Gardens (Lower Silesia)	PL	59
Buzău Carpathians and Subcarpathians	RO	47
Ljubljana	SI	306
Nitra	SK	167
Media tourism in Scotland	UK	40
∑		**1747**

4.1.2.   Profile of the average resident

First of all we describe the average resident in all cases studies. The 'average' resident of the sample over all case studies has the following characteristics: most of the residents are women between 30 and 60 years old, and were born in the country where they live. On average the residents have had 16 years of education, an occupation in the tertiary sector (professionals, service and sales workers, clerical support workers), and a total gross household income per year between 10,000 and 40,000 euros for a two-person household.

4.1.3.   Gender

Out of the ten residents in the case studies, there are on average 6 women and 4 men. So gender-wise the sample is not completely equally distributed. Only five of the respondents (0,3%) identify themselves as other or have not stated their gender. For comparison: the share of women in the EU population[5] of in total 229 million people is 51%.

When we look specifically at the case studies we see a more than average unequal distribution in the gender of the surveyed population in Ida-Virumaa in Estonia (29 male and 74 female), in the Greek Cyclades (42 male and 92 female), Nitra in Slovakia (52 male and 115 female) and Media tourism in Scotland (13 male and 27 female). The female respondents far outweigh male ones in Ida-Virumaa within the 51-65 age group. The prevalence of women's opinions can, according to the involved researchers, be explained by "the higher public activity of women and engagement with local issues – quite simply, this reflects the local reality that women are much more likely to agree to participate in surveys and express opinions about local life."

When we look at the demographic data of these case studies we see for Ida-Virumaa that the share of women is 54%, for Nitra 52.2%, for the Cyclades 50.5% and for Media tourism in Scotland 51.3%. In conclusion, the gender distribution in the sample is not representative for the case studies, there seems to have been a greater willingness among women to participate in the survey.

4.1.4.   Age

Among the residents, the age categories of thirties (299), forties (300) and fifties (327) are most represented. This means that approximately six out of ten residents are in the age group of 30 to 60 years. One in four residents is in their twenties or sixties. In comparison with statistical data of Eurostat[6] on age we see also that these age groups are most strongly represented.

When we zoom in on the case studies we see the following.

- The respondents in South Moravia (Czechia) were relatively young: 29 residents out of 40 residents (3 in 4) are in the age of 20-39. In a lesser degree, we also see this effect in Nitra (Slovakia): 30 out of 52 residents (3 in 5).
- The respondents in the Leichhardt Land (Germany), in the Beit-She'an Valley (Israel) and Media tourism in Scotland (United Kingdom) were relatively old: between 39 and 85 years old. In the Leichhardt landscape 66 out of 84 respondents (82%) were older than 50 years.

When we look at the statistical data of these case studies we see the following.

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[5] https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Gender_statistics

[6] https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Being_young_in_Europe_today_-_demographic_trends&oldid=386614

- The demographic pyramid in South Moravia is average, only in a part of the case study (Dolní Kounice) there are relatively a lot of older people. Therefore, concerning age the sample is not representative.
- In the Beit-She'an Valley the demographic pyramid shows a relatively young population in comparison with the other European case studies. Therefore, the sample is not representative for age.
- In the Leichhardt Land the pyramid shows a relatively old population. Therefore, the larger share of older respondents in the sample is representative for this case study.

4.1.5.   Country of origin

Most residents (on average 94.5%) are born in the case study country. In Ida-Virumaa (Estonia), Barcelona (Spain) and Cyclades-Andros (Greece) 25% or more of the residents stated that they were born in another country. In Ida-Virumaa these residents were born in Russia. Ethnic Russians are the biggest minority in Estonia. For Ida-Virumaa and Barcelona we see in the statistical data that there is a relative high percentage of total inhabitants belonging to an ethnic minority.

4.1.6.   Education

Requesting information about education encounters problems because the fifteen case studies have different education systems. The question asked was therefore about the number of years of education that had been completed. For many case studies it is indicated that more than 16 years of education have been completed (40% of the total). After this, 15, 14 and 13 years are mentioned the most, respectively. In other words, there is a high level of education. The European trend according to Eurostat[7] is that over the years there are less early leavers of education. However, there is often a tendency that more educated people participate in surveys, because they are more willing to cooperate and are more easily accessible than people with a lower social background.

4.1.7.   Occupation

For our question about occupation we have made use of the 2018 Standard Occupational Classification (SOC) system. This is a common classification of occupational information for the UK[8]. In some case studies the given classification groups for occupations were not known. In this situation people were asked directly for their occupation. The answers have been reclassified by the researchers into given occupational groups of the SOC system. We didn't make categories for situations where an occupation was missing, this has to be improved in a potential second wave of surveys.

Most respondents of the case studies were working as professionals or as service and sale workers and clerical support workers.

4.1.8.   Household income

The question for income is unusual and considered as unpolite in some countries. A lot of residents from Leichhardt Land (Germany), from Piedmont Landscape and Literary Park (Italy) and from Ljubljana (Slovenia) did not answer the question, more than for the other case study areas.

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7 https://ec.europa.eu/eurostat/web/education-and-training/visualisations

8 https://www.ons.gov.uk/methodology/classificationsandstandards/standardoccupationalclassificationsoc

Residents from the Buzău Carpathians and Subcarpathians (Romania), nearly 70% of the residents, the Valley of Palaces and Gardens (Poland), nearly 45% of the residents, Ida-Virumaa (Estonia) and South Moravia (Czechia), around 40%, have a household income below 10,000 euro. Most case studies show a relative large share of low incomes: between 10,000 and 40,000 euro. We see relative high incomes in Styrian Iron Route (Austria), Beit She'an-Valley (Israel), Piedmont Landscape and Literary Park and in Kinderdijk (The Netherlands): more than 35% of the surveyed residents have a household income above 40,000 euro.

4.1.9. Household composition

Out of every ten residents, nine have a household composition of 1 to 4 people. Couples are most common, followed by 3 and 4 persons, and single person households respectively. This corresponds with data of Eurostat[9] about the European average size of 2.3 persons in 2016.

4.2. Residents' view on cultural tourism

The resident's view on cultural tourism was surveyed via two questions, the first being an open question in which was asked what residents see as cultural activities, sites, etc. in their area. The second question was closed, and was on how important certain cultural attractions, sites and events are for their area on a scale from not important to very important. Results from the second question can be viewed in Table 17 (three most important cultural offers for each case study) and Table 18 (three least important cultural offers for each case study). The categories 'historical sites and buildings' and 'cultural heritage sites and buildings' occur most often in the top three, followed by 'restaurants/food festivals', 'music events (concerts/festivals)', 'local traditions/folklore' and 'cultural routes'. The categories deemed least important by residents were 'religious sites/events' and 'dance events'. Only residents in the Buzău Carpathians and Subcarpathians (Romania) found 'religious sites/events' among the most important offers. The categories 'health sites' and 'art galleries' are also often among the least important three offers. Health sites are of course quite a specific cultural attraction, that does not occur everywhere. Only in Komárom/Komárno (Hungary/Slovakia) residents put this offer in the top three. Art galleries are generally not viewed as an important cultural site for residents.

In all case studies, respondents mentioned specific sights in their area the most. This is in agreement with the closed question, as historical and cultural heritage sites and buildings were often deemed the most important. Besides, there was very often a mention of 'museums'. Respondents do view museums as a cultural site in their area, but seemingly do not view this as very important for their area as it only was in the top three in the Dutch case study of Kinderdijk. Lastly, often natural sites were mentioned by respondents, indicating that nature also is a very important part of culture in the case study areas.

Table 17: Three most important cultural tourism offers, as stated by residents. Choices were: museums, art galleries, historical sites and buildings, cultural routes, townscapes, (film) theatre, cultural heritage sites and buildings, restaurants/food festivals, music events (concerts/festivals), dance events, local traditions/folklore, religious sites/events, sports events, health sites (e.g. spas/hot springs).

Case study area	Offer 1	Offer 2	Offer 3
AT	Restaurants/food festivals	Music events (concerts/festivals)	Historical sites and buildings
CZ	Music events (concerts/festivals)	Local traditions/folklore	Historical sites and buildings
DE	Cultural routes	Restaurants/food festivals	Historical sites and buildings

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[9] https://ec.europa.eu/eurostat/statistics-explained/index.php?title=%20People_in_the_EU_%E2%80%93_statistics_on_household_and_family_structures&oldid=375234#Average_household_size

EE	Historical sites and buildings	Music events (concerts/festivals)	Townscapes
ES	Historical sites and buildings	Cultural heritage sites and buildings	Cultural routes
GR	Historical sites and buildings	Cultural heritage sites and buildings	Local traditions/folklore
HU/SK	Historical sites and buildings	Health sites (e.g. spas/hot springs)	Cultural heritage sites and buildings
IL	Restaurants/food festivals	Film/theatre	Music events (concerts/festivals)
IT	Restaurants/food festivals	Cultural heritage sites and buildings	Local traditions/folklore
NL	Museums	Cultural heritage sites and buildings	Townscapes
PL	Townscapes	Historical sites and buildings	Cultural routes
RO	Religious sites/events	Local traditions/folklore	Cultural heritage sites and buildings
SI	Historical sites and buildings	Cultural heritage sites and buildings	Cultural routes
SK	Historical sites and buildings	Film/theatre	Cultural heritage sites and buildings
UK	Townscapes	Cultural routes	Cultural heritage sites and buildings

Table 18: Three least important cultural tourism offers, as stated by residents. Choices were: museums, art galleries, historical sites and buildings, cultural routes, townscapes, (film) theatre, cultural heritage sites and buildings, restaurants/food festivals, music events (concerts/festivals), dance events, local traditions/folklore, religious sites/events, sports events, health sites (e.g. spas/hot springs).

Case study area	Offer 1	Offer 2	Offer 3
AT	Art galleries	Religious sites/events	Health sites (e.g. spas/hot springs)
CZ	Art galleries	Religious sites/events	Museums
DE	Film/theatre	Religious sites/events	Art galleries
EE	Religious sites/events	Dance events	Local traditions/folklore
ES	Health sites (e.g. spas/hot springs)	Religious sites/events	Sport events
GR	Health sites (e.g. spas/hot springs)	Sport events	Dance events
HU/SK	Religious sites/events	Dance events	Sport events
IL	Religious sites/events	Dance events	Sport events
IT	Dance events	Sport events	Religious sites/events
NL	Dance events	Health sites (e.g. spas/hot springs)	Art galleries
PL	Art galleries	Dance events	Religious sites/events
RO	Sport events	Dance events	Health sites (e.g. spas/hot springs)
SI	Religious sites/events	Health sites (e.g. spas/hot springs)	Dance events

SK	Dance events	Art galleries	Health sites (e.g. spas/hot springs)
UK	Health sites (e.g. spas/hot springs)	Dance events	Film/theatre

4.3.   Benefits for residents from cultural tourism

The question of how residents can benefit from cultural tourism was also open. The following points were mentioned often by the respondents.

- Economic benefits are mentioned the most by respondents. Residents can profit by an increased job offer, or by the selling of products and services (e.g. local products or accommodation).
- Improvement of the infrastructure in the area is also seen as a potential benefit for residents.
- Likewise, gastronomy is mentioned often, residents can profit from an increased and/or improved offer of restaurants.
- Other points that are mentioned in several case studies is how cultural tourism can improve the image of the region, and help to revitalize the case study area. The responses were different in the two over-touristed case study areas (although also in these cases the above described points were mentioned). In the Spanish case study of Barcelona residents stated that they should be prioritized over tourists, for example by reinvesting in efforts to improve services and quality of life for residents. In Kinderdijk (The Netherlands) many respondents stated that benefits for residents are not possible, tourism is too much of a nuisance in the area.

4.4.   Residents and tourists

This section is about how residents feel about tourists visiting their area, for example tourist numbers, the impact cultural tourism has on residents and their quality of life, and the interaction between residents and tourists.

4.4.1.   Tourist numbers
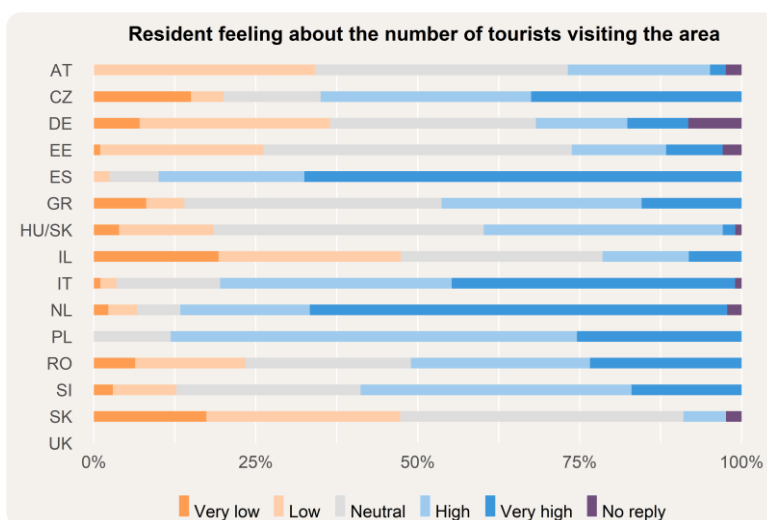
Figure 14: Resident feeling about the number of tourists visiting the area.

View of tourist numbers by residents is shown in Figure 14. In seven out of fourteen case studies the categories 'high' and 'very high' are over 50%, meaning that in those case studies the number of tourists is

seen as high. In two case studies (Beit-She'an Valley, Israel; and Nitra, Slovakia) almost 50% of the respondents feels the tourist numbers are low. In the Beit-She'an Valley is seen as under-touristed, and residents also feel that tourist numbers are low. Nitra is seen as both under and over touristed, however, residents do not see current tourist numbers as high. From the seven case studies where residents feel tourist numbers are high or very high, only two are viewed as over touristed: Barcelona (Spain) and Kinderdijk (The Netherlands). One case study (Ljubljana, Slovenia) is viewed as being both under and over touristed, but the remaining four (South Moravia, Czechia; Piedmont Landscape, Italy; Valley of Palaces and Gardens, Poland; Buzău Carpathians and Subcarpathians, Romania) are categorized as under touristed, which does not seem to correspond with how residents feel about tourist numbers.

4.4.2. Impact of an increase of cultural tourism

Although Figure 14 showed that tourist numbers were often high according to residents, the impact of an increase of cultural tourism is generally seen as positive or very positive (Figure 15). Only in the Dutch case study, Kinderdijk, over 50% of respondents stated that an increase would be negative or very negative. In the city of Nitra (Slovakia) and Barcelona (Spain) fewer residents think of an increase as positive or very positive, but these case studies had a larger number of people with a neutral position.
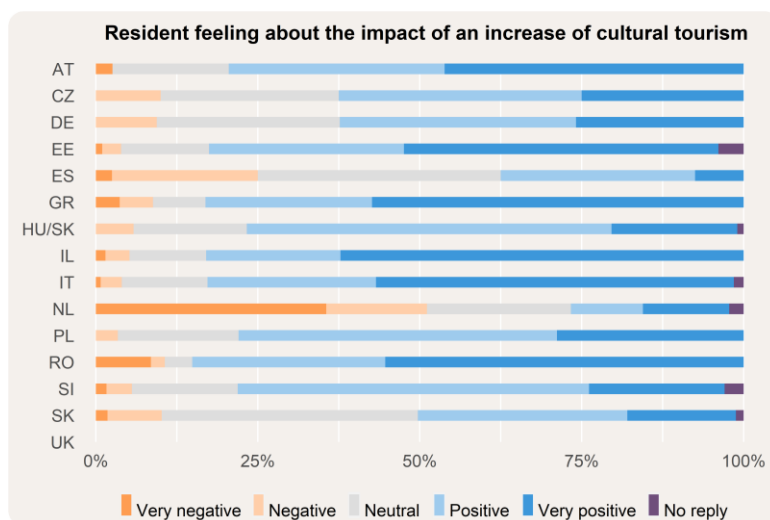
Figure 15: Resident feeling about the impact of an increase of cultural tourism on the area (for example on infrastructure, jobs, quality of life).

4.4.3. Interaction between residents and tourists

Interaction between residents and tourists was measured in the form of how often residents give tips to tourists (Figure 16). Interaction was common (50% or more in the categories 'some tips' and 'many tips') in seven case studies: Styrian Iron Route (Austria), South Moravia (Czechia), Barcelona (Spain), the Cyclades (Greece), Komárom/Komárno city (Hungary/Slovakia), Piedmont Landscape (Italy), and the Buzău Carpathians and Subcarpathians (Romania). Although all but one of these case studies is seen as under touristed, resident-tourist interactions still seem to occur quite often. However, also in the remaining case studies around 25% or more of the respondents said to give some or many tips, so interaction seems to be quite common in all areas.
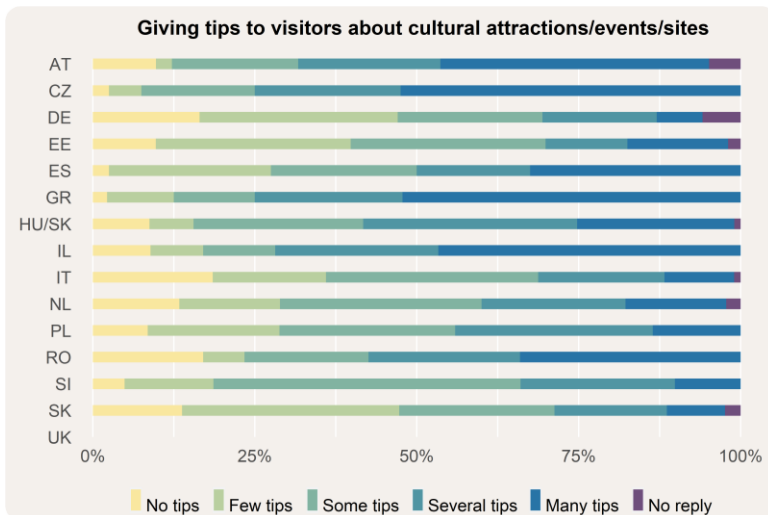
Figure 16: Residents giving tips to tourists about attractions, events, sites, etc, as a measure of interaction between residents and tourists.

4.4.4.   Impact on local traditions

In all fourteen case studies, over 50% of respondents found that there is an impact of tourists on local traditions (Figure 17, left). However, only in two case studies (Kinderdijk, The Netherlands; and Barcelona, Spain) over 50% of respondents view this impact as (very) negative (Figure 17, right). These are also the two case studies which are seen as being over touristed. In seven of the remaining case studies over 50% of respondents found the impact of tourists on local traditions to be (very) positive: South Moravia (Czechia), Ida-Virumaa (Estonia), Komárom/Komárno city (Hungary/Slovakia), Piedmont Landscape (Italy), Valley of Palaces and Gardens (Poland), Buzău Carpathians and Subcarpathians (Romania), and Ljubljana (Slovenia).
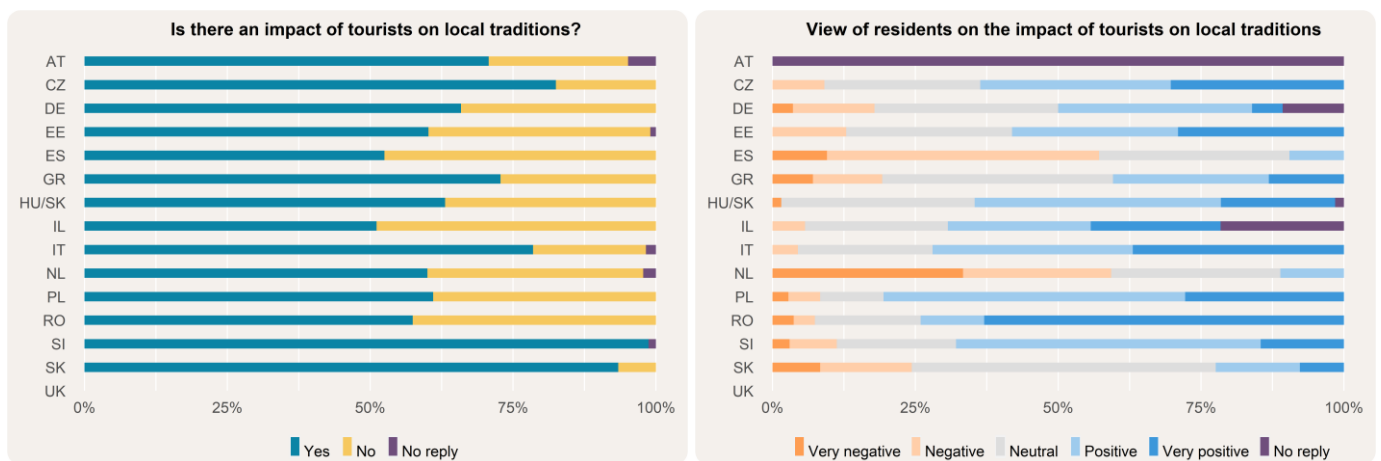
Figure 17: Resident view on whether there is an impact of tourists on local traditions or not (left figure) and how the residents that answered yes view this impact. In the Austrian case study (Styrian Iron Route) this question was open instead of categorised, and therefore the answers were marked as 'no reply'.

4.4.5. Impact of tourism-related nuisance

Tourism-related nuisance such as noise, garbage and disrespectfulness is generally seen as (very) small and neutral by the residents (Figure 18). Among these are areas of which residents stated in a previous question that tourist numbers were high, namely Piedmont Landscape (Italy), Valley of Palaces and Gardens (Poland), and Buzău Carpathians and Subcarpathians (Romania). Residents do not perceive tourists as a nuisance in these areas. In only three case studies the share of respondents stating the impact to be (very) large is close to 50% (South Moravia, Czechia; and Ljubljana, Slovenia) or over 50% (Barcelona, Spain). Of these, only South Moravia is seen as an under touristed area. Unfortunately, this question was mistakenly not surveyed in the Dutch case study of Kinderdijk.

Impact of tourism-related nuisance on daily life
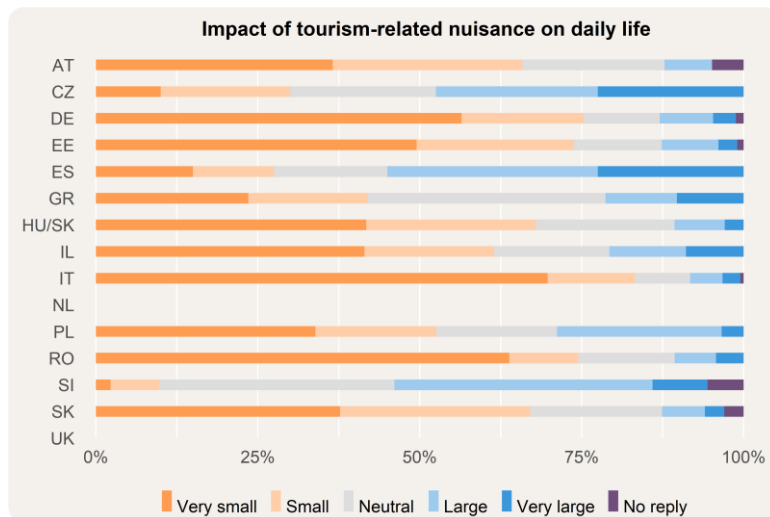
Figure 18: Resident feeling on tourism-related nuisance (such as noise, garbage and disrespectfulness). This question was unfortunately not asked in the Dutch case study, therefore this data is missing.

How likely are residents to recommend visiting this area to others

4.4.6. Recommending the area

In thirteen case studies (this question was mistakenly not surveyed in the Kinderdijk case study) at least 65% of the residents are (very) likely to recommend a visit to the area to others (Figure 19). This indicates that residents are in general proud of the area they live in and would like tourists to experience the area.
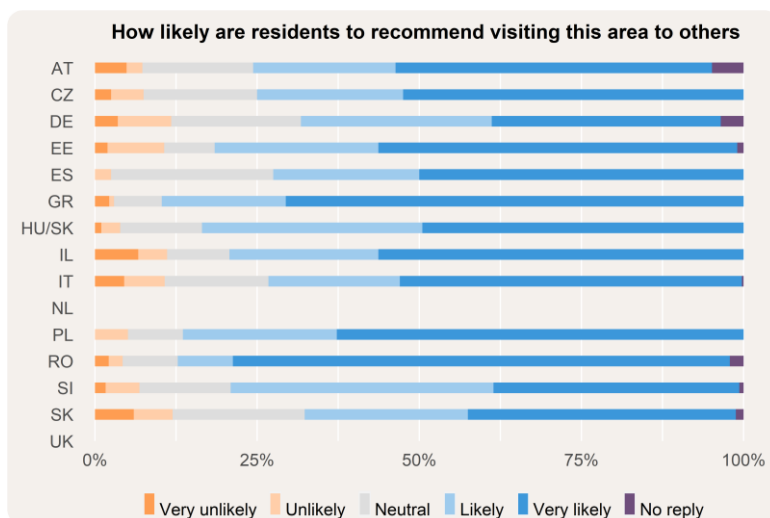
Figure 19: How likely residents are to recommend a visit to the area to others. This question was unfortunately not asked in the Dutch case study, therefore this data is missing.

4.5. Accessibility of the area

Average rating scores given by residents on accessibility to the area from outside are generally good (Table 19, left). Six out of fourteen case studies give accessibility a rating of 4 or higher (on a scale from 1 to 5). All case studies give a rating of 3 or higher. Accessibility within the area scores a bit different (Table 19, right). For example, residents in South Moravia (Czechia) give accessibility to the area from outside on average a rating of 3.9, but accessibility within the area a rating of 2.1, a difference of almost 2 points. For other case

studies, scores do not differ much, at most 0.4 points. Overall it would appear that for most case studies residents are not dissatisfied about accessibility from outside or within the area.

Table 19: Average accessibility rating given by residents to the area from outside (left) or within the case study area (right) from a rating of 1 (very difficult) to 5 (very easy). Averages calculated over the respondents that answered the question, per case study. Case studies are ordered by their descending average ratings.

Accessibility from outside the case study area		Accessibility within the case study area	
Case study area	Average rating	Case study area	Average rating
ES	4.5	ES	4.5
PL	4.4	PL	4.1
RO	4.1	EE	3.9
HU/SK	4.1	HU/SK	3.8
GR	4.1	IT	3.7
EE	4.0	GR	3.7
CZ	3.9	RO	3.7
IT	3.8	SI	3.7
SK	3.7	SK	3.6
SI	3.7	IL	3.5
NL	3.3	NL	3.4
IL	3.2	AT	3.0
DE	3.1	DE	2.9
AT	3.0	CZ	2.1
UK	-	UK	-

4.6.   Residents, cultural tourism and COVID-19

In order to find out more about residents visiting cultural attraction, sites, and events in their own area, we surveyed for fourteen cultural attractions whether these were visited more, less or the same as before. The fourteen attractions were: museums, art galleries, historical sites and buildings, cultural routes, townscapes, (film) theatre, cultural heritage sites and buildings, restaurants/food festivals, music events (concerts/festivals), dance events, local traditions/folklore, religious sites/events, sports events, and health sites (e.g. spas/hot springs). The COVID-19 crisis of course has a very large impact on cultural tourism activities, with many sites and services being closed and lockdowns being implemented, so therefore it is not surprising that respondents in all case studies often stated that they visited the surveyed categories less or much less. However, there is a trend visible over the listed attractions. Music and dance events were visited much less, than for example townscapes. We show four cultural attractions in this report in plots (Figure 20): 'art galleries', 'townscapes', 'restaurants/food festivals', and 'music events (concerts festivals)'. The remaining cultural attractions look similar to the ones shown here. One can clearly see that in all four figures, a large proportion of the respondents stated that they visit the attraction less or much less. However, this proportion is in general the lowest for townscapes, and the highest for music events. This could be explained by the fact that in many places governmental measures prohibited the occurrence of (large) events such as concerts and festivals. Townscapes on the other hand can be visited easily. However, also in this case, quite a large proportion of respondents stated that they visited (much) less. This could indicate that residents avoided public spaces, or that complete lockdowns prevented residents from leaving their houses.
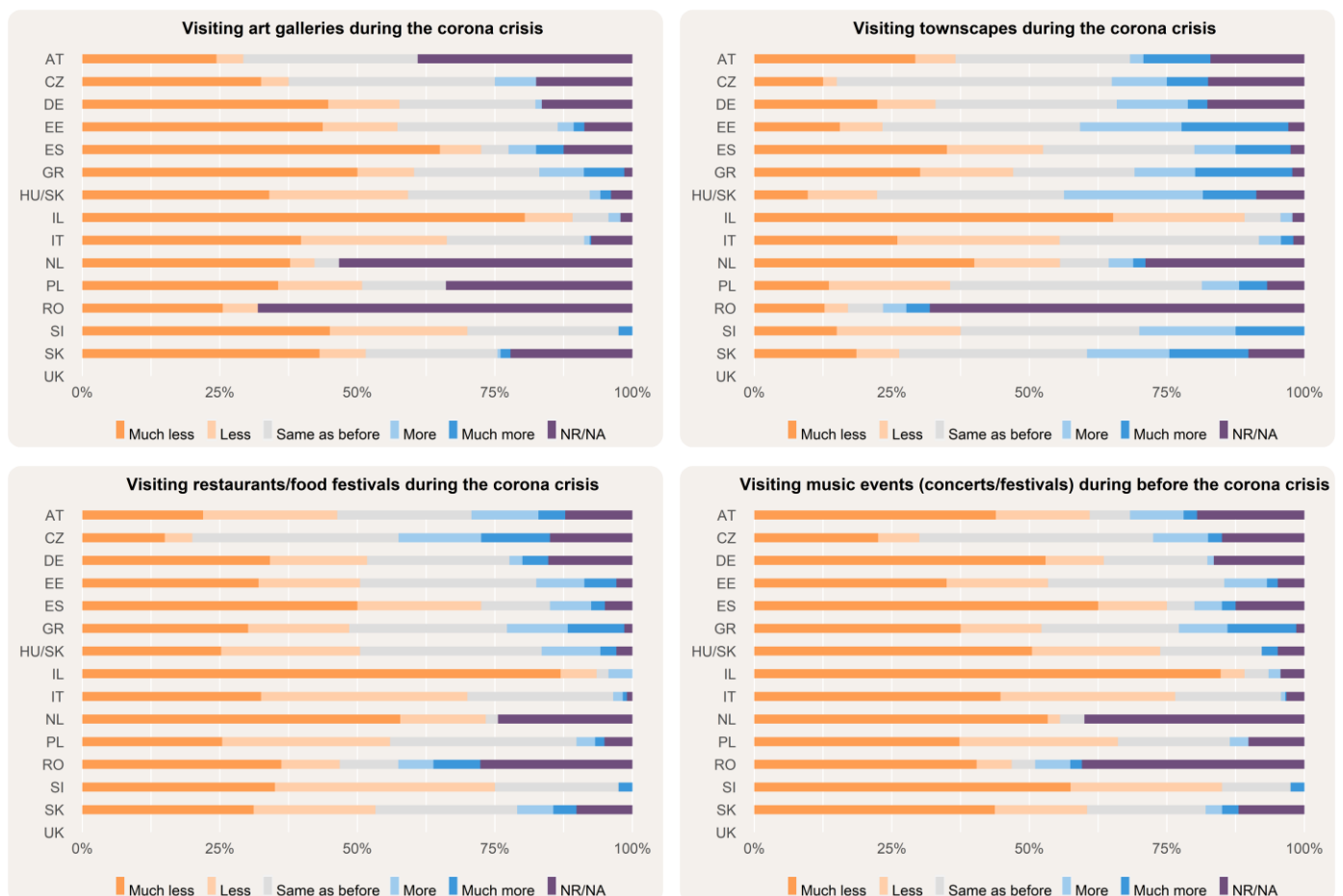
Figure 20: Do residents visit art galleries (top left), townscapes (top right), restaurants/food festivals (bottom left), and music events (bottom right) more or less than before the corona crisis. NR/NA: no reply or not applicable answered.

Comparing the different case studies in the plots shows that patterns per country look very similar, regardless of the cultural attraction. For example, the proportion of respondents in Beit-She'an Valley (Israel) and

Barcelona (Spain) that answered (much) less is consistently higher than in the remaining case studies. This could be explained by the very strict COVID-19 restriction policies implemented by their respective governments. Similar consistent patterns, regardless of cultural attraction, can also be distinguished for other case studies, indicating that perhaps these results can be strongly influenced by governmental COVID-19 policies.

5. Business survey results

5.1. Division of businesses

5.1.1. Number of surveyed businesses

The total number of businesses participating in this survey is 937 (Table 20). The lowest number of businesses participating in the survey per case study was 9 for the Kinderdijk case study (The Netherlands), see also explanation in section 2.3.3. In six case studies, the number of businesses who completed the survey was below 40: Kinderdijk (9), the Styrian Iron Route (20), the Leichhardt Land (22), Media tourism in Scotland (25), Komárom/Komárno (33) and Ida-Virumaa (38). The highest number of businesses participating in the survey per case study is 402 in Piedmont Landscape and Literary Park in Italy. However, many of these surveys have only been filled in partially, leading to a large number of no-replies for most questions.

Table 20: Total number of respondents participating in the survey for businesses (N=937).

Case study area	Code	N
Styrian Iron Route	AT	20
South Moravia	CZ	40
Leichhardt Land	DE	22
Ida-Virumaa	EE	38
Art Nouveau in Barcelona	ES	40
The Cyclades	GR	67
Komárom/Komárno	HU/SK	33
Beit-She'an Valley	IL	44
Piedmont Landscape and Literary Park	IT	402
Kinderdijk in the Water Triangle	NL	9
Valley of Palaces and Gardens (Lower Silesia)	PL	62
Buzău Carpathians and Subcarpathians	RO	50
Ljubljana	SI	40
Nitra	SK	45
Media tourism in Scotland	UK	25
Σ		**937**

5.1.2. Type of businesses

The division of surveyed businesses can be seen in Table 21. Businesses were asked to choose between 'attraction', 'accommodation', 'restaurant/cafe/bar' or 'other'. A further division was made for the categories 'attractions' and 'accommodations', which will be discussed later in this section. In most case studies, a substantial number of interviewed businesses are either an accommodation, or a restaurant, cafe or bar.

Table 21: Division of surveyed businesses: attraction, accommodation, restaurant or other.

Case study area	Attraction	Accommodation	Restaurant, cafe or bar	Other	No reply
AT	4	3	2	3	8
CZ	7	8	22	3	0
DE	1	18	0	2	1
EE	10	12	10	6	0

Case study area	Attraction	Accommodation	Restaurant, cafe or bar	Other	No reply
ES	2	23	5	10	0
GR	9	32	6	2	18
HU/SK	0	15	15	2	1
IL	31	1	6	6	0
IT	40	145	57	114	46
NL	1	4	1	3	0
PL	7	35	11	9	0
RO	23	22	3	2	0
SI	12	13	2	13	0
SK	6	9	29	1	0
UK	-	-	-	-	-

The busiest season for the most businesses is summertime, followed by autumn. Springtime is not so busy for most businesses, except for five case study areas: Kinderdijk in The Netherlands (7 out of 9, 78%), Barcelona in Spain (28 out of 40, 70%), Ljubljana in Slovenia (20 of 40, 50%), Komárom/Komárno in Hungary/Slovakia (17 out of 33 businesses, 52%) and the Cyclades in Greece (35 out of 67 businesses, 52%). For most businesses the least busiest season is wintertime. In Komárom/Komárno (13 out of 33 businesses, or 39%) and Nitra in Slovakia (18 out of 45 businesses, 40%) there are relatively many businesses which indicate that wintertime is the most busy season.

For most businesses, the average age is more than 10 years. There are three case studies that stand out because the age of surveyed businesses deviate from this. These are Komárom/Komárno (28 out of 33 businesses, or 85%), South Moravia in Czechia (31 out of 40 businesses, or 78%) and Nitra (35 or 45 businesses, or 78%). About 18% of the businesses have been in existence for more than 6 years. About 12% of businesses have been in existence for less than 4 years. About half of these businesses are from the Piedmont Landscape and Literary Park in Italy: 85 have been in existence for 4 to 5 years.

The most common ownership of the surveyed businesses is family-owned business. After this, private business ownership is the most present type of ownership. The public sector as type of ownership follows at a distance. For the case study of the Buzău Carpathians and Subcarpathians in Romania (11 of 50 businesses) and for Ljubljana (8 out of 40) and South Moravia (6 out of 40) these numbers of public sector ownership are higher than the average in other case studies. In most of the case study areas there are very few surveyed entrepreneurs part of an international or national chain, however, in Barcelona 10 businesses (25%) are part of an (inter)national chain.

Visitor attractions

Respondents of the businesses that stated they were an attraction describe their businesses as farms or wine yards (55 out of 73 are in Piedmont Landscape and Literary Park), museums (42), cultural heritage sites (25), nature sites (9), historical sites (8), visitor centres (7) and art galleries (6).

The average visitor capacity for cultural attractions per year is as follows. 54 businesses have less than 1000 visitors; 49 businesses have between 1000 and 5000 visitors; 15 businesses between 5000 and 10.000 visitors; 48 businesses between 10.000 and 50.000 visitors and 16 businesses between 50.000 and 100.000 and 19 businesses more than 100.000 visitors in a year.

Accommodations

A further division of accommodations in the case studies was made: 71 one star hotels, 52 two or three star hotels and 49 four or five star hotels, 53 farms, 5 camp sites, 15 hostels, and 21 AirBnBs. The AirBnB is only

present in the Cyclades, Piedmont Landscape and Literary Park, Valley of Palaces and Gardens (Poland), Ljubljana and Barcelona. Camp sites were represented in South Moravia, Leichhardt Land (Germany), Piedmont Landscape and Literary Park and Komárom/Komárno.

The total number of beds differ in the accommodations. 129 businesses offer less than 10 beds. 82 businesses offer 10 to 20 beds. 76 businesses offer 21 to 50 beds. 22 businesses offer 100 to 200 beds and 9 businesses offer more than 200 beds.

The estimated occupancy rate in spring is less than or equal to 40% for 151 respondents, between 41 and 69% for 99 respondents and equal to or more than 70% for 55 respondents. 18 respondents answered that their accommodation was closed. The estimated occupancy rate in summer is less than or equal to 40% for 55 respondents, between 41 and 69% for 82 respondents and equal to or more than 70% for 164 respondents. 7 respondents answered that their accommodation was closed. The estimated occupancy rate in autumn is less than or equal to 40% for 99 respondents, between 41 and 69% for 103 respondents and equal to or more than 70% for 113 respondents. 8 respondents answered that their accommodation was closed. The estimated occupancy rate in winter is less than or equal to 40% for 150 respondents, between 41 and 69% for 50 respondents and equal to or more than 70% for 26 respondents. 94 respondents answered that their accommodation was closed.

The average length of stay is mostly 2 to 4 nights (230 respondents), 5 to 7 nights (52 respondents) and 1 night (48 respondents).

5.2. Type of tourists and estimated income

The type of tourist businesses received the most were families and couples or tourists travelling alone, in twelve and eleven out of fifteen case studies respectively these were among the three most stated types (Table 22). After, both outdoor or adventure searching and special-interest tourism were among the most received type of tourist in nine case studies. This indicates that tourists are often attracted to the different case studies because they are interested in specific activities or attractions that the case studies offer. For example, in the Greek Cyclades tourists could be interested in attending arts festivals or gastronomy and wine. The choice for special-interest tourism could also be a result of the types of businesses interviewed. For example, in Ljubljana (Slovenia) most of the businesses surveyed offer theme or visitor-group specific content. Business/work-related tourism is found in five case studies, mass tourism/large groups/package groups in two.

Table 22: Most received type of tourists per case study. Choices were: mass tourism/large groups/package groups, special-interest tourism, outdoor/adventure searching, eco-tourism, families, couples/travelling alone, and business/work-related groups.

Case study area	1st type	2nd type	3rd type
AT	Couples/travelling alone	Families	Outdoor/adventure searching
CZ	Eco-tourism	Business/work-related groups	Mass tourism/large groups/package groups
DE	Families	Couples/travelling alone	Special-interest tourism
EE	Couples/travelling alone	Business/work-related groups	Families
ES	Couples/travelling alone	Special-interest tourism	Families
GR	Couples/travelling alone	Families	Special-interest tourism
HU/SK	Couples/travelling alone	Families	Business/work-related groups
IL	Outdoor/adventure searching	Special-interest tourism	Business/work-related groups
IT	Couples/travelling alone	Special-interest tourism	Families
NL	Couples/travelling alone	Special-interest tourism	Business/work-related groups

PL	Families	Couples/travelling alone	Outdoor/adventure searching
RO	Families	Outdoor/adventure searching	Mass tourism/large groups/package groups
SI	Outdoor/adventure searching	Special-interest tourism	Families
SK	Couples/travelling alone	Families	Business/work-related groups
UK	Couples/travelling alone	Families	Outdoor/adventure searching

The approximate share of income that business receive from domestic tourism varies per case study, although in general most case studies seem to rely largely on income from domestic tourists (Figure 21). In Barcelona (Spain), Kinderdijk (The Netherlands), the Cyclades, Ljubljana and the Piedmont Landscape and Literary Park (Italy), the number of businesses with a share of income from domestic tourists of below 30% is a bit higher, indicating that in these case studies businesses are more dependent on foreign tourism. In some case studies, most businesses rely largely on domestic tourism, such as in South Moravia (Czechia), the Leichhardt Land (Germany), Valley of Palaces and Gardens (Poland), Buzău Carpathians and Subcarpathians (Romania) and Nitra (Slovakia), whereas in the other case studies businesses are more evenly distributed among the categories.
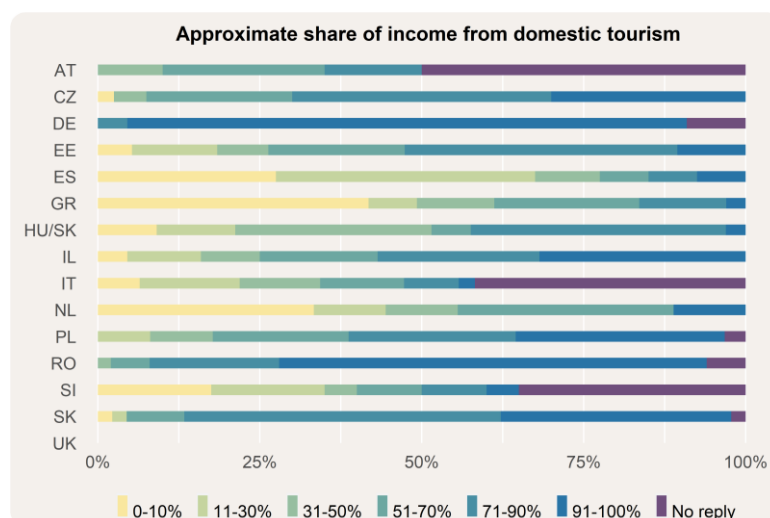
Figure 21: Estimated share of income from domestic tourism.

5.3.   Promotion of businesses

The three methods that are most used by businesses to promote themselves are their website, social media and word of mouth (Table 23). Surveyed businesses in all except two case studies used all these three methods the most. In the Leichhardt Land (Germany) online travel agents (such as booking.com) were used more than social media, and in Nitra (Slovakia) TripAdvisor was used more than word of mouth. In Komárom/Komárno (Hungary/Slovakia) printed media were also a commonly used method of promotion.

Table 23: The number of respondents using a certain method of promotion. Most used methods per case study are marked with a green colour.

Case study area	Website	Social media	TripAdvisor	Travel agent/tourist information centre	Online travel agent (e.g. booking.com)	Printed media	Word of mouth	Links from partner websites
AT	10	7	1	4	6	5	8	5
CZ	35	34	11	8	3	9	26	7
DE	19	5	3	7	9	7	18	4

Case study area	Website	Social media	TripAdvisor	Travel agent/tourist information centre	Online travel agent (e.g. booking.com)	Printed media	Word of mouth	Links from partner websites
EE	33	32	13	22	15	25	34	16
ES	34	36	16	13	20	7	25	15
GR	52	45	34	16	34	16	43	18
HU	31	19	0	15	15	22	19	8
IL	19	25	4	14	3	10	39	9
IT	207	158	70	60	80	44	172	39
NL	7	6	2	2	3	2	5	1
PL	50	33	2	6	20	17	29	11
RO	43	45	14	9	22	16	36	12
SI	15	25	15	11	0	12	24	0
SK	36	28	21	11	7	20	17	7
UK	20	23	14	4	5	8	22	8
Total	611	521	220	202	242	220	517	160

5.4. Current cultural tourism

5.4.1. Cultural themes offered

Gastronomy/wine is the most common theme offered among the businesses surveyed (Table 24). This can be explained by the large share of restaurants/cafes/bars and accommodations surveyed for most case studies (see section 5.1.2). Other themes that are commonly offered by the businesses are 'heritage' and 'history'. In four case studies, folklore and local traditions was an important theme as well. In Komárom/Komárno (Hungary/Slovakia) businesses offer the themes 'music' and 'dance', probably also connected to the very high share of accommodations and restaurants/cafes/bars interviewed. The themes 'film', 'theatre', and 'literature' were the three least offered themes among the businesses interviewed, followed by 'religion', 'dance', and 'archaeology'.

Table 24: Three most common themes offered among the surveyed businesses per case study.

Case study area	1st theme	2nd theme	3rd theme
AT	Heritage	History	Gastronomy/wine
CZ	Gastronomy/wine	Heritage	Music
DE	-	-	-
EE	History	Heritage	Gastronomy/wine
ES	Gastronomy/wine	Architecture/townscapes	History
GR	Gastronomy/wine	Heritage	Folklore/local traditions
HU/SK	Gastronomy/wine	Music	Dance
IL	Heritage	History	Archaeology
IT	Gastronomy/wine	Heritage	Folklore/local traditions
NL	Heritage	History	Architecture/townscapes; artwork

Case study area	1st theme	2nd theme	3rd theme
PL	Gastronomy/wine	History	Folklore/local traditions
RO	Gastronomy/wine	Folklore/local traditions	Heritage
SI	Artwork	History	Heritage
SK	Gastronomy/wine	Heritage	History
UK	Gastronomy/wine	Artwork	History

5.4.2. Tourist numbers

From the results shown in Figure 22, it seems that on average businesses are quite satisfied with the number of tourists visiting their establishments. The share of respondents stating that they currently have the right number of tourists visiting is quite large in most case studies. Only in Komárom/Komárno (Hungary/Slovakia) and the Buzău Carpathians and Subcarpathians (Romania) the share of respondents stating that they have (too) many tourist visits is larger than 50%. In the Greek Cyclades and Barcelona (Spain) around 45% of respondents feel there are (too) many tourists visiting. The share of respondents stating there are (too) little tourists visiting is lower than 50% in all case studies, but it is the highest in Ida-Virumaa (Estonia), the Beit-She'an Valley (Israel) and South Moravia (Czechia).
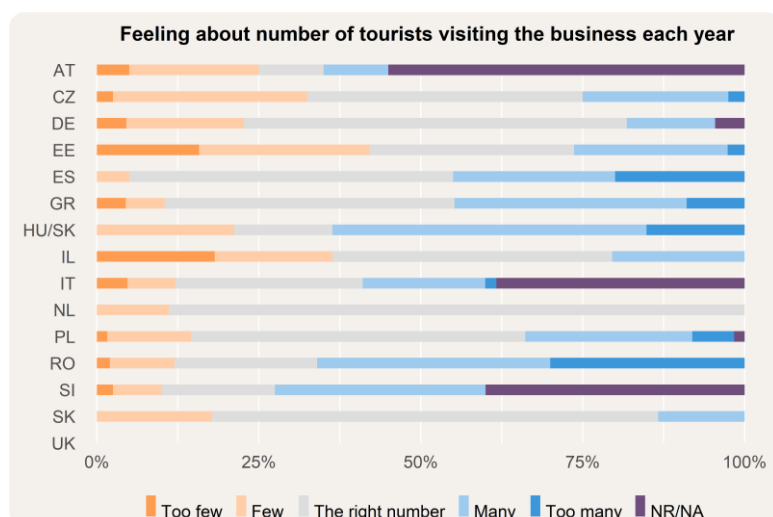
Figure 22: Feeling among the businesses about the number of tourists visiting their establishments each year.

5.4.3. Current development of cultural tourism

In general, surveyed businesses in all case studies agree that it is important that cultural tourism is present in the area (Figure 23, left). In all case studies, over 50% of businesses agree (strongly) with this statement. In most case studies, the share of respondents disagreeing (strongly) is very low. Only in the Beit-She'an Valley (Israel), Piedmont Landscape and Literary Park (Italy) and Buzău Carpathians and Subcarpathians (Romania) the share of businesses disagreeing (strongly) is higher.

However, businesses do not always feel that cultural tourism is well developed in the area (Figure 23, right). Opinions on this statement are very divided, which could be an indication that the definition of cultural tourism is not very clear. Disagreement is the strongest in the Leichhardt Land (Germany), the Buzău Carpathians and Subcarpathians, the Greek Cyclades and Ida-Virumaa (Estonia). In Nitra (Slovakia) and Valley of Palaces and Gardens (Poland) the largest share of respondents feel that cultural tourism is well developed in their respective case studies.

On the whole, there seems to be a feeling in all case studies that cultural tourism is important, but it is not clear whether cultural tourism is well developed.
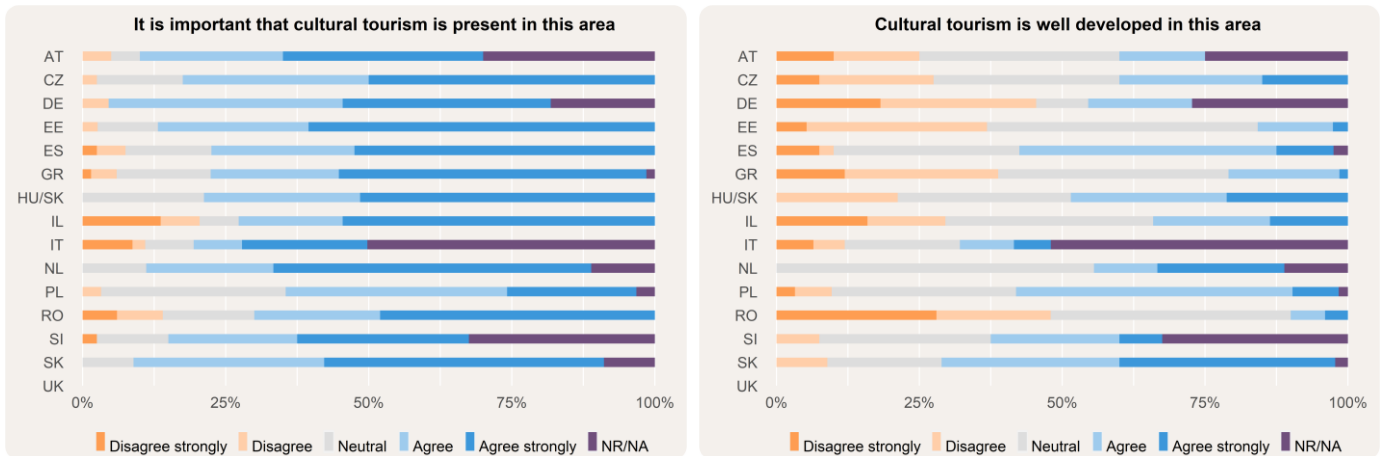
Figure 23: Agreement with statements 'it is important that cultural tourism is present in this area' (left) and 'cultural tourism is well developed in this area' (right).

5.4.4. Diversity of cultural attractions

In most case studies generally businesses agree (strongly) that there are enough cultural attractions/site/events in the area (Figure 24, left). The share of respondents agreeing strongly is the highest in Komárom/Komárno (Hungary/Slovakia), Nitra (Slovakia), the Buzău Carpathians and Subcarpathians (Romania) and Valley of Palaces and Gardens (Poland). The largest share of businesses disagreeing strongly with this statement is in South Moravia (Czechia) and to a lesser extent in the Beit-She'an Valley (Israel), the Styrian Iron Route (Austria), and Barcelona (Spain) and the Piedmont Landscape and Literary Park (Italy). For the Leichhardt Land in Germany the number of no-replies for both statements was too high to give conclusions.

Surveyed businesses feel similar about the diversity of cultural attractions/sites/events in the areas (Figure 24, right). In eleven case studies, the share of businesses that responded to the question and feel there is a good diversity of attractions is larger than 50%. Only in the Greek Cyclades and the Piedmont Landscape and Literary Park this share is around 40%. In a few case studies a larger share (>25%) of respondents (excluding no-replies) disagree (strongly) that there is a good diversity. This is the case in the Piedmont Landscape and Literary Park, Styrian Iron Route, the Beit-She'an Valley and the Cyclades.
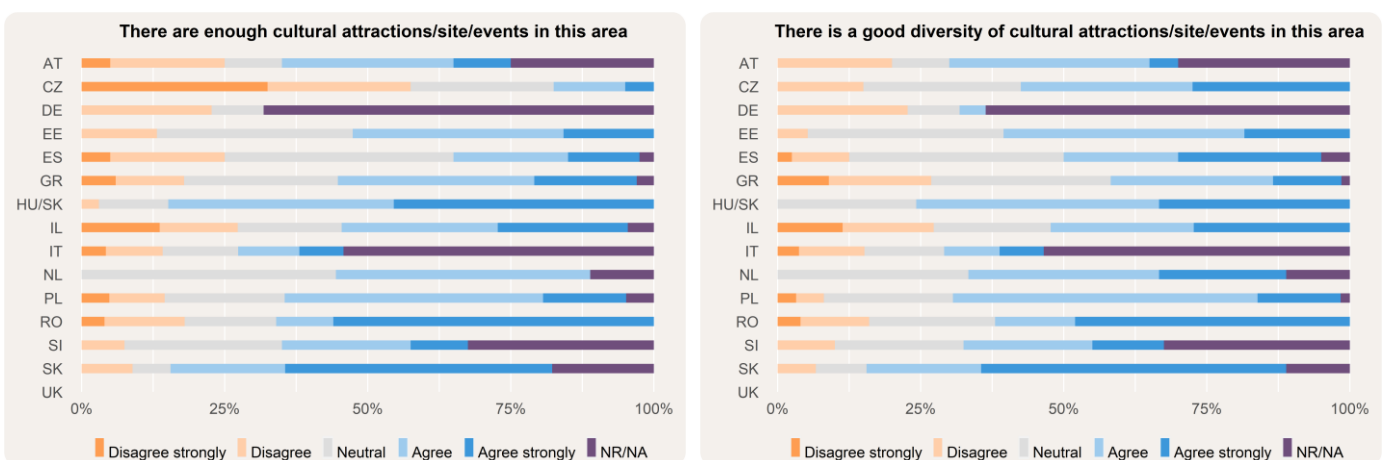
Figure 24: Agreement with statements there are enough cultural attractions/site/events in this area' (left) and 'there is a good diversity of cultural attractions/site/events in this area' (right).

5.5.   Future cultural tourism

5.5.1.   Tourist numbers and flow

For almost all case studies, the share of respondents (excluding no-replies) agreeing (strongly) with the statement that tourist numbers should be higher in this area is around 50% or larger (Figure 25, left). This is somewhat contradictory with the results shown in Figure 22, where it seemed that on average businesses are quite satisfied with the number of tourists visiting their establishments. Perhaps most businesses feel they do not need more visitors, but would potentially like more visitors for their businesses if the number of visitors to the area increased. An exception is Barcelona (Spain), where the share of respondents agreeing (strongly) is a little over 25%.

The share of respondents disagreeing (strongly) with this statement is the highest in Barcelona, the Beit-She'an Valley (Israel) and the Piedmont Landscape and Literary Park (Italy), although in these last two cases agreement is a lot more common.

Businesses also feel that tourist flows should be better regulated in the area (Figure 25, right). For all case studies except Komárom/Komárno (Hungary/Slovakia), South Moravia (Czechia), Barcelona and the Leichhardt Land (Germany) the share of respondents agreeing (strongly) was around 50% or higher. For these last two case studies this share is around 40%. This is surprising, considering that most of the case studies are seen as under-touristed and Figure 7 showed that businesses also feel that tourist numbers should be higher. Only Nitra (Slovakia) and Ljubljana (Slovenia) are seen as both under- and over touristed. Businesses agreed the least on this statement in Komárom/Komárno.

Disagreement was strongest in the Beit-She'an Valley and Komárom/Komárno.
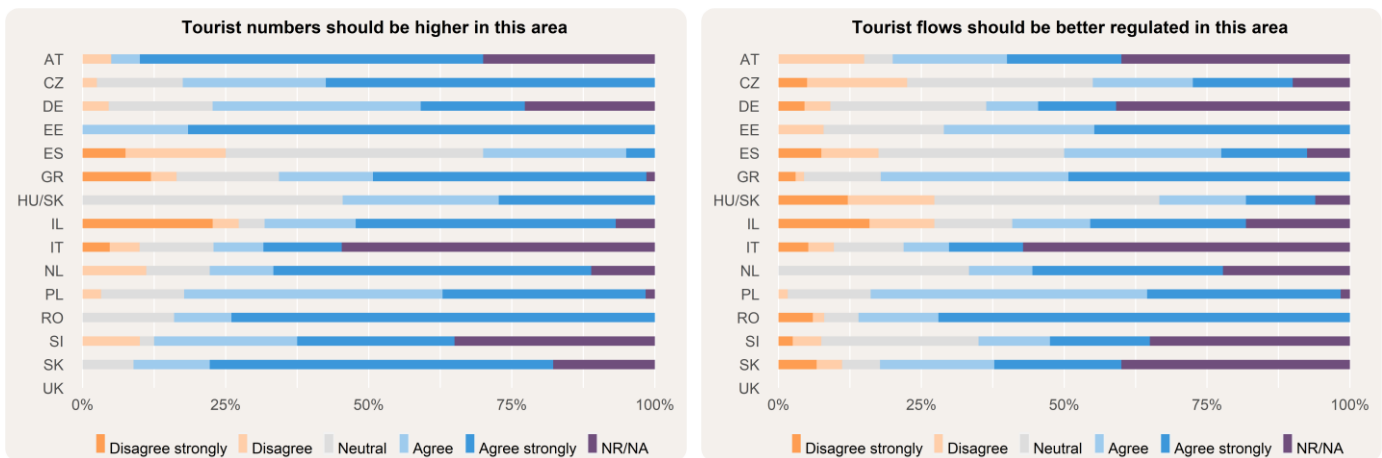
Figure 25: Agreement with statements 'tourist numbers should be higher in this area' (left) and 'tourist flows should be better regulated in this area' (right).

5.5.2. Future development of cultural tourism

Agreement with the statement that their respective areas have a lot of potential for cultural tourism is high for all case studies (Figure 26, left). The same can be said about whether there are still locations/traditions with potential as a cultural attraction (Figure 26, right). In most case studies, the majority agrees with this statement. This indicates that not only respondents feel that cultural tourism is important, but also see opportunities for an increase of cultural attractions.
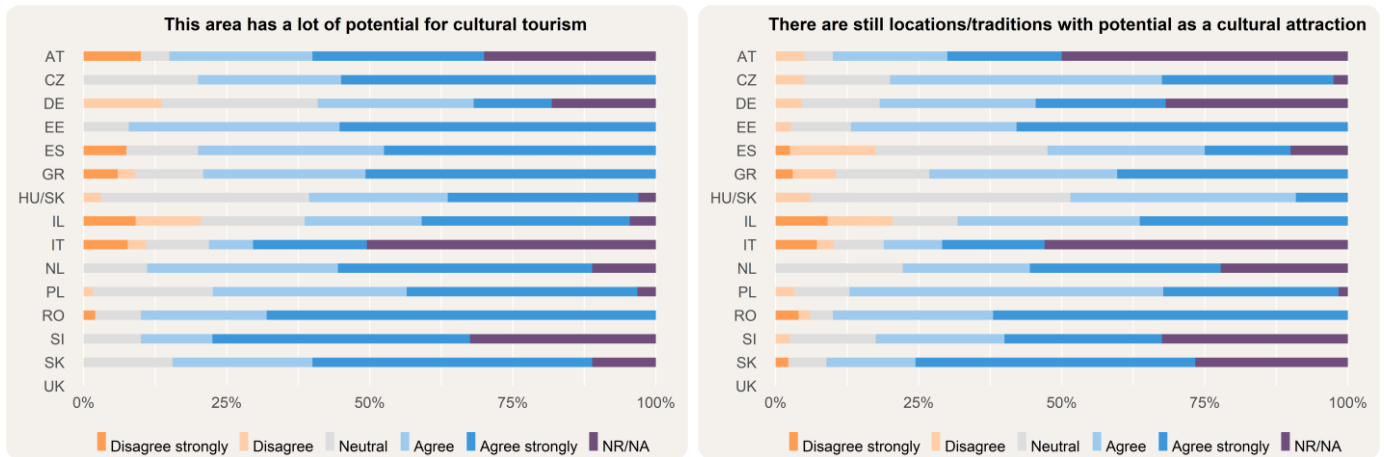
Figure 26: Agreement with the statements 'this area has a lot of potential for cultural tourism' (left) and 'there are still locations/traditions in this area that have potential as a cultural attraction (right).

There was also an open question on what could be improved in the area – and by whom – in order to improve the experience both for tourists and for their businesses. A number of common themes can be determined among the different case studies.

- The first is that businesses in most case studies stated that they expect more from (local) authorities. This can be for example with (financial) support for tourism businesses, but also by improving infrastructure, ensuring that information is made available to the general public and by providing services such as public toilets and parking spaces.
- Infrastructure was another recurring theme among the case studies. In many case studies the quality of roads is inadequate and should be improved. Also, new roads and connections should be built. Besides this, there is a lack of bicycle paths, sidewalks and trails in several case studies. Public transport often leaves something to be desired, especially off-season.
- Promotion, advertising and communication also leaves room for improvement. There is a lack of road and information signs and markings.
- Lastly, frequent mentions were made about cooperation. There should be more cooperation between authorities, the private sector and the cultural sector.

Furthermore, in Barcelona (Spain) a common theme that can be improved is (the perception of) safety, a theme that was less mentioned among the other case studies.

5.5.3. Economic improvement

The two factors most often mentioned that could lead to economic improvement in the study areas are infrastructure (such as improvements in road network) and publicity/marketing (Table 25). For all case studies at least one of these is in the top three, and for most both factors are in the top three. The third most important factor over all case studies is information provision to tourists. This is followed by public transport. These results are in agreement with the suggestions for improvement described in section 5.5.2.

Table 25: Three factors per case study that could lead to the most economic improvement according to the surveyed businesses. Options were: infrastructure (such as improvements in road network), public transport (such as improvements in bus network), publicity/marketing, events, attractions, gastronomy (such as more and/or better restaurants) and information provision to tourists.

Case study area	1st aspect	2nd aspect	3rd aspect
AT	Gastronomy	Publicity/marketing	Information provision
CZ	Infrastructure	Information provision	Publicity/marketing
DE	Gastronomy	Infrastructure	Events
EE	Events	Publicity/marketing	Attractions
ES	Infrastructure	Public transport	Publicity/marketing
GR	Infrastructure	Information provision	Public transport
HU/SK	Publicity/marketing	Infrastructure	Events
IL	Attractions	Publicity/marketing	Infrastructure
IT	Infrastructure	Publicity/marketing	Public transport
NL	Infrastructure	Publicity/marketing	Public transport
PL	Infrastructure	Public transport	Publicity/marketing
RO	Infrastructure	Information provision	Publicity/marketing
SI	Publicity/marketing	Events	Information provision
SK	Infrastructure	Publicity/marketing	Attractions
UK	-	-	-

5.5.4. Governmental involvement
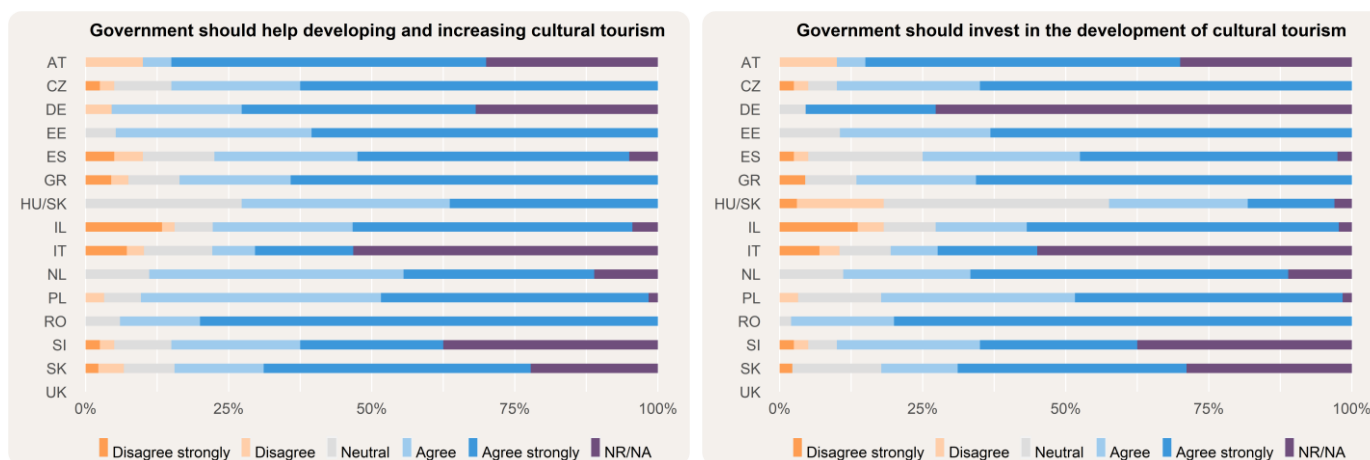
Figure 27: Agreement with statements 'government should help businesses with developing and increasing cultural tourism in this area' (left) and 'government should invest in the development of cultural tourism in this area' (right).

On the whole, respondents feel that government should be involved in the development of cultural tourism in their respective case study areas. This was seen in the suggestions for improvement described in section 5.5.2. From these suggestions it becomes clear that businesses expect more from local authorities, and this result is confirmed by their answers to the statements 'government should help businesses with developing and increasing cultural tourism in this area' and 'government should invest in the development of cultural tourism in this area'. In all case studies over 50% of respondents (excluding no-replies) agree (strongly) with the first statement (Figure 27, left) and in all but one of the case studies over 50% agrees with the second statement (Figure 27, right). In Komárom/Komárno (Hungary/Slovakia) around 40% agrees (strongly). Around 20% disagrees (strongly) in this case study, which is surprising, considering that none of the respondents disagreed with the first statement. Disagreement with both statements was the highest in the Beit-She'an Valley (Israel) and Piedmont Landscape and Literary Park (Italy).

5.6.   Visitors and culture

Respondents generally do not seem to feel that their visitors would be willing to spend a bit extra to support the local economy (Figure 28A). This is especially the case in Ida-Virumaa (Estonia), Barcelona (Spain), Komárom/Komárno (Hungary/Slovakia), Ljubljana (Slovenia) and the Beit-She'an Valley (Israel). In these case studies, the share of respondents disagreeing (strongly) with the statement is quite large. In other case studies, the reverse can be seen. A large share of respondents agree (strongly). This is the case in the Buzău Carpathians and Subcarpathians (Romania), Valley of Palaces and Gardens (Poland), the Cyclades (Greece), South Moravia (Czechia), Kinderdijk (The Netherlands), Media tourism in Scotland (United Kingdom) and Nitra (Slovakia).

On the other hand, in all case studies by far most of the respondents do agree (strongly) that it is important for their visitors to get a taste of local culture and traditions (Figure 28B). Disagreement with this statement was highest in the Styrian Iron Route (Austria), the Beit-She'an Valley and to a lesser extent in Barcelona.

In most case studies respondents tend to agree (strongly) with the statement that their visitors spend a considerable part of their time visiting cultural attractions (Figure 28C). This is not the case in Komárom/Komárno, where the share of respondents disagreeing (strongly) is larger. Other case studies where disagreement was relatively large compared to the rest are the Beit-She'an Valley, Styrian Iron Route, Media tourism in Scotland, and Nitra.

Opinions are a bit more divided on the statement that tourists visit the areas specifically because of its cultural appeal (Figure 28D). Agreement was highest in the case studies South Moravia, Ljubljana, the Buzău Carpathians and Subcarpathians, Ida-Virumaa, Kinderdijk, Media tourism in Scotland, and Valley of Palaces and Gardens. Disagreement was highest in the case studies the Styrian Iron Route, the Leichhardt Land (Germany), Komárom/Komárno, Media tourism in Scotland, and the Beit-She'an Valley.

In general, respondents agree (strongly) with the statement that their visitors ask them for recommendations on cultural attractions, sites and events (Figure 28E). Disagreement was highest in Styrian Iron Route, Nitra, Media tourism in Scotland, and the Beit-She'an Valley.
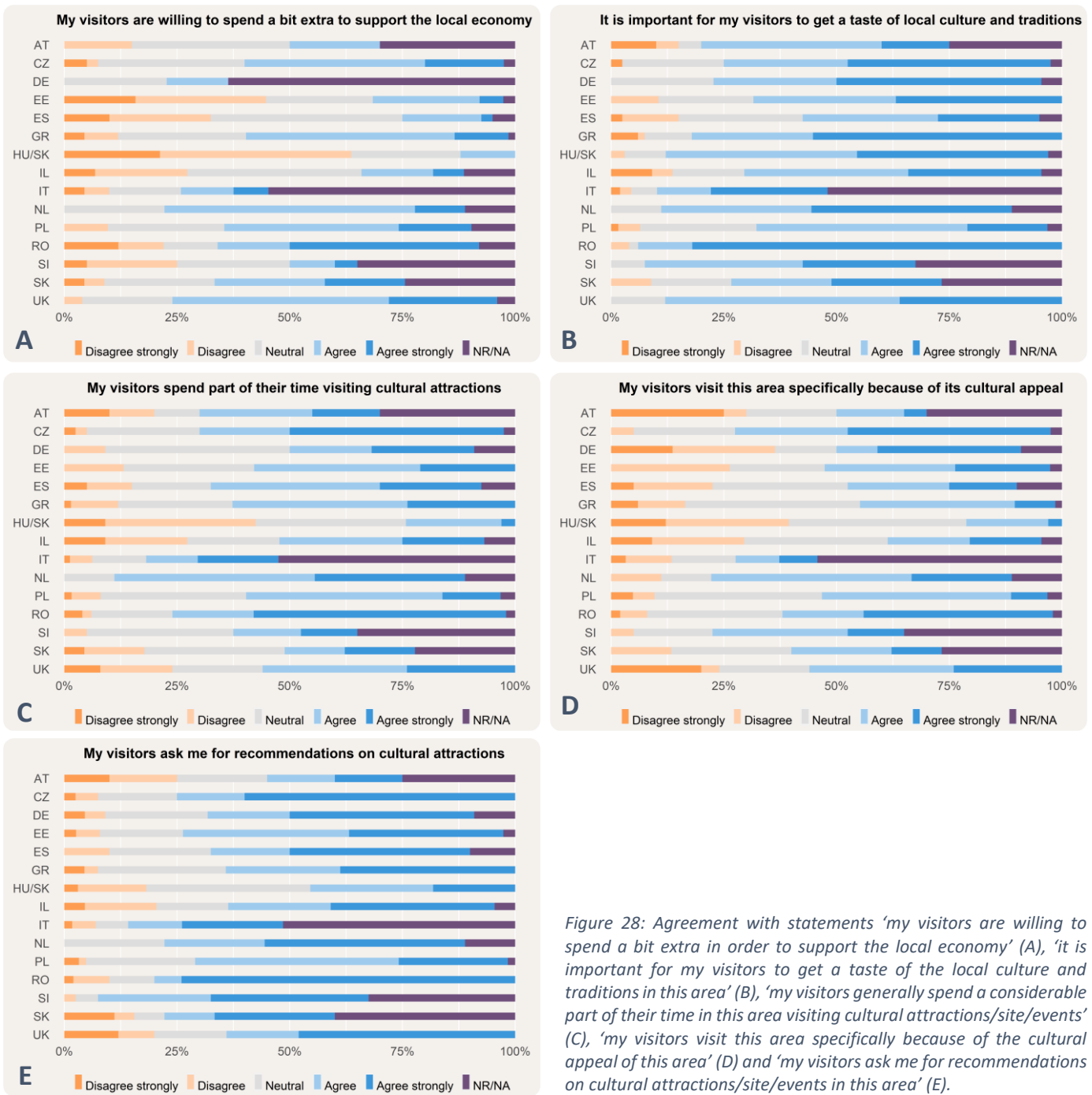
Figure 28: Agreement with statements 'my visitors are willing to spend a bit extra in order to support the local economy' (A), 'it is important for my visitors to get a taste of the local culture and traditions in this area' (B), 'my visitors generally spend a considerable part of their time in this area visiting cultural attractions/site/events' (C), 'my visitors visit this area specifically because of the cultural appeal of this area' (D) and 'my visitors ask me for recommendations on cultural attractions/site/events in this area' (E).

5.7.   Cooperation

As was clear from section 5.5.2, businesses see cooperation as a means of improving the cultural tourism sector in their respective case studies. Currently the most used method of cooperation between businesses is joint activities (Table 26). Businesses from most case studies use this method. Other often used methods are sharing cultural itineraries and routes, and sharing marketing strategies. However, a substantial number of businesses also stated there was no cooperation. It is clear that improvements can be made here.

Table 26: The number of respondents using a certain method of cooperation with other tourist businesses in the area. Most used methods per case study are marked with a green colour.

Case study area	Cultural itineraries and	Marketing strategies	Buffering tourist flows	Lobbying at public authorities	Joint purchases	Joint activities	No cooperation
AT	6	7	3	5	4	8	2
CZ	9	5	4	2	4	12	23
DE	4	4	0	3	0	4	6
EE	20	20	7	9	4	24	7
ES	23	6	0	2	2	8	14
GR	18	14	3	2	13	24	19
HU/SK	6	4	3	0	1	13	11
IL	16	17	2	4	7	20	11
IT	112	28	30	16	2	45	79
NL	5	1	0	1	0	4	3
PL	6	11	3	4	4	16	29
RO	12	3	2	0	2	12	11
SI	6	15	12	2	7	1	10
SK	12	14	1	1	0	12	18
UK	-	-	-	-	-	-	-

The results shown in Figure 29 also clearly show the lack of current cooperation between businesses and the cultural sector on the one hand, and the wish to have more cooperation on the other. No clear agreement can be found in most case studies for the statements 'there is cooperation between my businesses and the cultural sector' and 'there is cooperation between tourism businesses in this area and the cultural sector' (Figure 29; A and C). A substantial share disagrees (strongly) with this statement, or is neutral. Cooperation between the surveyed businesses (Figure 29A) is higher in Ljubljana (Slovenia) and Ida-Virumaa (Estonia). In Nitra (Slovakia) respondents seem to feel that cooperation between tourist businesses and the cultural sector exists (Figure 29C), but they themselves generally do not cooperate (Figure 29A).

Figure 29B and D show that a substantial share of businesses in most case studies feel there is potential for an increased cooperation with the cultural sector both for tourist businesses in general, and their own business in particular. Agreement is lowest in Komárom/Komárno (Hungary/Slovakia) and the Leichhardt Land (Germany), although in this last case a large proportion of surveyed businesses did not respond to the questions.
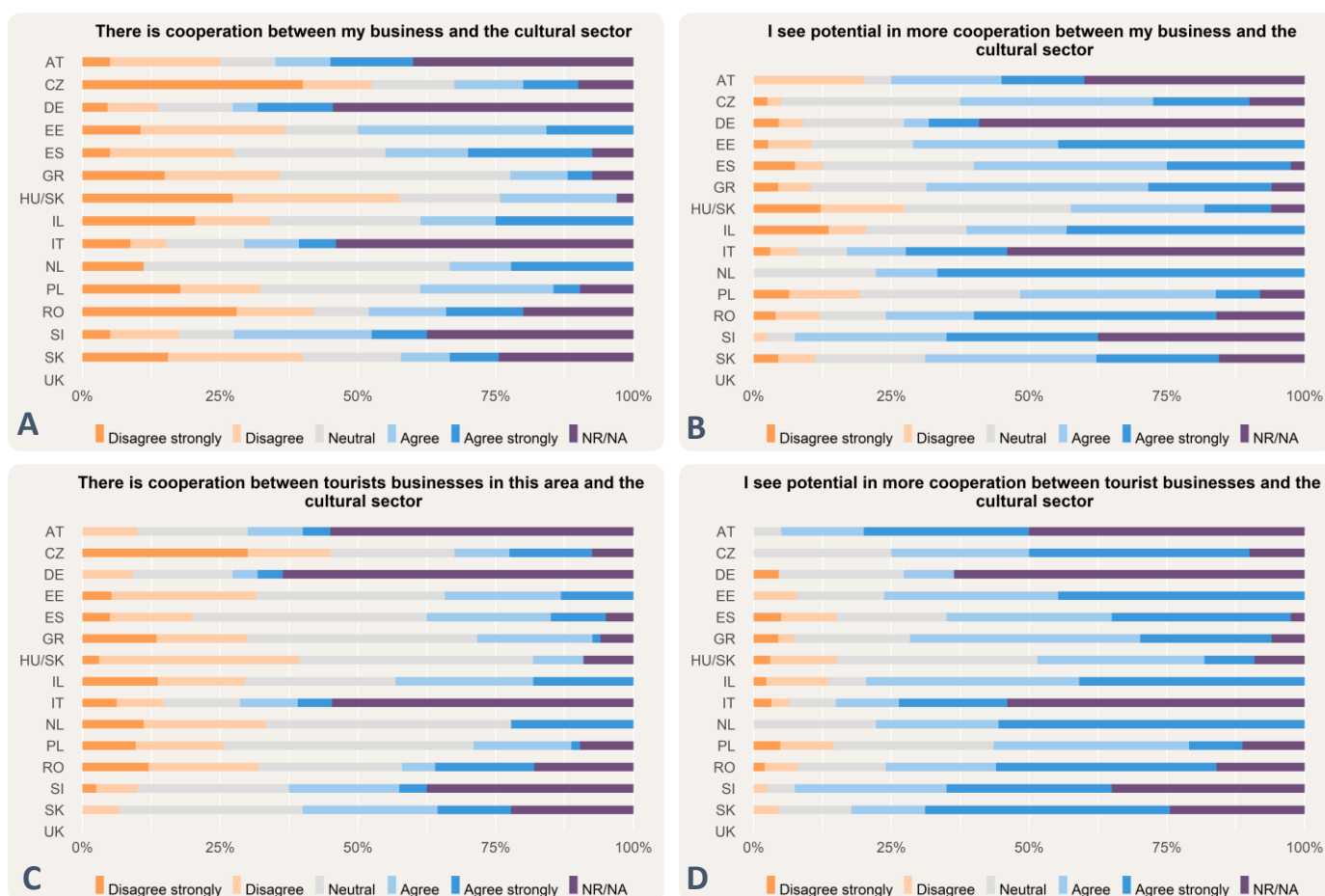
Figure 29: Agreement with statements 'there is cooperation between my business and the cultural sector' (A), 'I see potential in more cooperation between my business and the cultural sector' (B), 'there is cooperation between tourism businesses in this area and the cultural sector' (C) and 'I see potential in more cooperation between tourist businesses in this area and the cultural sector' (D).

5.8. Tourism businesses and COVID-19

Businesses have not been affected equally by COVID-19 and its accompanying measures and restrictions. As Table 27 shows, there are case studies where many businesses have been affected by COVID-19: South Moravia (Czechia), Ida-Virumaa (Estonia), Barcelona (Spain), the Cyclades (Greece), the Beit-She'an Valley (Israel), Kinderdijk (The Netherlands), Valley of Palaces and Gardens (Poland), the Buzău Carpathians and Subcarpathians (Romania) and Nitra (Slovakia). Over 75% percent of the businesses surveyed in these case studies stated that their business has been affected by COVID-19. For the Styrian Iron Route (Austria), Leichhardt Land (Germany), Komárom/Komárno (Hungary/Slovakia), the Piedmont Landscape and Literary Park (Italy) and Ljubljana (Slovenia) the percentage of businesses that are affected by COVID-19 is (much) lower: between 41 and 68%.

Table 27: Percentage of businesses in the case study areas which have been affected by COVID-19.

Case study area	Affected by COVID-19 (%)
AT	41
CZ	85
DE	68
EE	92
ES	100
GR	93
HU/SK	55

Case study area	Affected by COVID-19 (%)
IL	89
IT	54
NL	78
PL	85
RO	84
SI	68
SK	91
UK	-

Governments have provided support to entrepreneurs affected by COVID-19 in various ways. That support consisted of financial assistance with furloughs of staff, support with giving out loans, general advice or other. When comparing the number of entrepreneurs that have received support from the government (Table 28), we see that in some case studies a low number of businesses have received governmental support: the Styrian Iron Route and the Leichhardt Land. In South Moravia, the Cyclades, Barcelona, the Piedmont Landscape and Literary Park, Valley of Palaces and Gardens and Ljubljana relatively many businesses have received governmental support in the form of financial assistance with furloughs. In the case study areas of South Moravia, the Cyclades, the Piedmont Landscape and Literary Park and in Valley of Palaces and Gardens relatively the most businesses, in comparison with other case studies, received support by getting loans. In Ida-Virumaa, the Piedmont Landscape and Literary Park, Valley of Palaces and Gardens and Nitra the government has supported businesses with general advice. The case studies of Ida-Virumaa, the Beit-She'an Valley, the Piedmont Landscape and Literary Park and the Buzău Carpathians and Subcarpathians have received support of the government in another form. This could also mean no support whatsoever.

Table 28: Number of businesses that received certain types of governmental support for COVID-19.

Case study area	Financial assistance with furloughs	Loans	General advice	Other
AT	2	2	2	2
CZ	27	9	7	0
DE	2	0	3	3
EE	7	1	19	26
ES	24	15	0	16
GR	34	13	9	4
HU/SK	9	0	4	0
IL	9	0	2	22
IT	70	44	13	30
NL	2	1	2	0
PL	20	19	14	8
RO	7	0	2	19
SI	20	3	3	3
SK	4	2	27	0
UK	-	-	-	-

Businesses have also undertaken measures by themselves to offset the negative impact of the pandemic. The following three activities have been mentioned the most: 1) maintain connections with existing customers, 2) enhancing existing digital services (e.g. website, social media) and 3) advertising as normal. The following

three activities were mentioned less: 1) enhancing existing digital services (e.g. website, social media), 2) developing other new initiatives/products and 3) exploring new markets.

Businesses have adopted new measure(s) regarding their employees due to the COVID-19 pandemic. The measures mentioned by the entrepreneurs in decreasing number: not hired, furloughed with pay, furloughed with partial pay, redirected to other tasks, kept on the books with zero hours contracts, laid off.

Half of the businesses think that their business can be sustained under the present circumstances for less than 6 months. A third of the businesses think that their business can sustained under the present circumstances for more than one year. 17% of the businesses think that their business can be sustained under the present circumstances between half a year and a year.

Businesses have been affected by the COVID-19 outbreak in three different ways: 1) by reduced international and national visitor numbers, 2) by cancellations of bookings, rearrangements and postponements of bookings and reduced level of bookings. These first two are effects on the demand side of cultural tourism. The third way is 3) by cancelled events and forced closure of establishments, on the supply side of cultural tourism.

In Figure 30 the impact of reduced international and national visitor numbers according to businesses in the different case studies is shown. According to the surveyed businesses in Ida-Virumaa, Kinderdijk, Media tourism in Scotland (United Kingdom), Barcelona, the Cyclades, Komárom/Komárno, the Beit-She'an Valley, the Piedmont Landscape and Literary Park, the Buzău Carpathians and Subcarpathians, Ljubljana and Nitra there is a strong impact of reduced international visitor numbers (Figure 30, left). Impact of reduced national visitor numbers is smaller. Comparing with the impact of reduced national visitor numbers we see that the impact is strong according to 25% of the businesses (Figure 30, right). In South Moravia, Barcelona, Komárom/Komárno, the Beit-She'an Valley, Kinderdijk and Nitra 40% or more see also a strong impact for national visitor numbers.
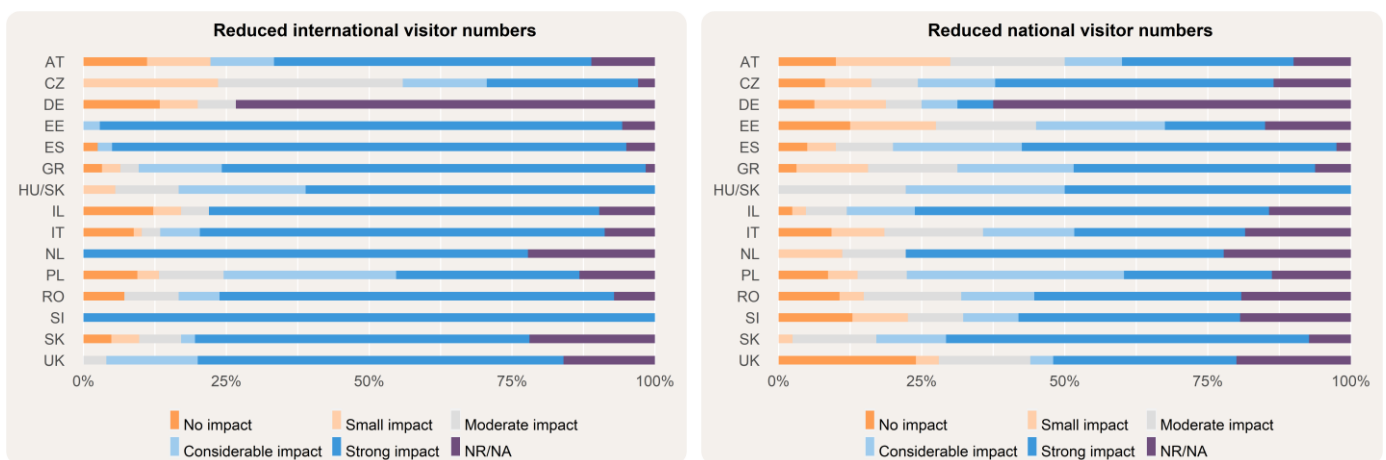
Figure 30: Impact of reduced international (left) and national visitor numbers (right) due to COVID-19.

Figure 31 shows the impacts of changes in bookings according the businesses in the case study areas. In Komárom/Komárno, Valley of Palaces and Gardens, the Buzău Carpathians and Subcarpathians and Nitra surveyed businesses do not see an equally strong impact of cancellations of bookings as businesses in other case study areas (Figure 31, top left). In these countries there is also less strong impact of reduced levels of bookings than in the other case study areas (Figure 31, bottom left). For businesses in Barcelona, the Beit-She'an Valley, Ljubljana, Ida-Virumaa and the Cyclades there is also a stronger impact of COVID-19 on rearrangements of bookings or postponed bookings (Figure 31, top right). However, for all three changes in bookings, the impacts were generally considerable or strong in all case studies.

Figure 31: Impact of cancellations of bookings (top left) rearrangements/postponement of bookings (top right) and reduced levels of bookings (bottom left) due to COVID-19.

Figure 32 shows the impact of cancelled events and forced closure of the surveyed businesses due to COVID-19. For many businesses in the Styrian Iron Route, Ida-Virumaa, Barcelona, Kinderdijk and Ljubljana cancelled events have a strong impact (Figure 32, left). In the Cyclades, Komárom/Komárno, the Beit-She'an Valley, the Piedmont Landscape and Literary Park, Valley of Palaces and Gardens and the Buzău Carpathians and Subcarpathians we also see that many businesses state a strong or considerable impact. However, impact is considerable or strong in all case studies.

The impact of forced closure was less clear, although still a large share of the businesses in all case studies suffered a considerable to strong impact of forced closure due to COVID-19 (Figure 32, right). For Ida-Virumaa and for Komárom/Komárno there was less impact of forced closure of establishments than in the other case study areas.
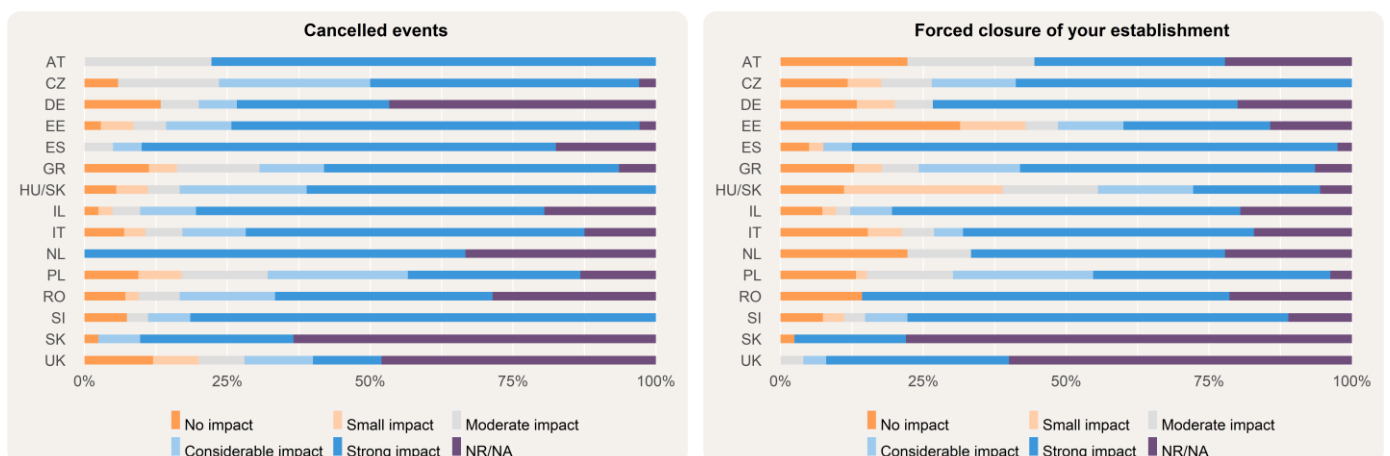
Figure 32: Impact of cancelled events (left) and forced closure of establishments (right) due to COVID-19.

6. Discussion and conclusions

In this chapter we answer our research questions, discuss the COVID-19 related results, discuss some points of improvement for this study and give our recommendations for future research. Our research questions were introduced in section 1.6. To recap, they are as follows.

Central question

What similarities and differences exist in tourists', residents' and entrepreneurs' experiences and views on cultural tourism in different case study areas (*individually or as part of a cluster: under or over touristed, deindustrialised, urban and/or rural, remote peripheral or central*) and what are the potentials of cultural tourism?

- Sub question 1: what is the behaviour and experience of tourists visiting the destinations and what are their interests regarding cultural tourism?
- Sub question 2: what is the view of residents on cultural tourism in their area and what is the impact of (cultural) tourism?
- Sub question 3: what is the current situation and future potential of cultural tourism according to tourism entrepreneurs?

The outbreak of the COVID-19 pandemic just after the start of the SPOT project inevitably led to the additional 4th sub question: what is the influence of the COVID-19 pandemic on Cultural Tourism?

As mentioned before in the introduction of this report case studies have been clustered into three groups based on their characteristics (section 1.5). For reference, these can be viewed below in Table 29. These clusters are used as a basic reference while answering the research questions.

Table 29: Case study clusters and criteria.

Group	Country	Case study	Over-tourism	Under-tourism	Urban	Rural	Deindustrialised	Central	Peripheral	Media-tourism
A	ES	Art Nouveau in Barcelona	•		•			•		
	NL	Kinderdijk in the Water Triangle	•			•		•		
	SI	Ljubljana	•	•	•			•		
	HU/SK	City of Komárom/Komárno		•	•	•		•	•	
	SK	City of Nitra	•	•	•	•		•		
B	CZ	South Moravia		•	•	•	•	•	•	
	AT	Styrian Iron Route		•		•	•		•	
	RO	Buzău Carpathians/ Subcarpathians		•		•	•		•	
	DE	Leichhardt Land		•	•	•	•		•	
	PL	Valley of Palaces and Gardens		•	•	•	•		•	
C	GR	The Cyclades		•	•	•			•	
	EE	Ida-Virumaa		•	•	•			•	
	IT	Piedmont Landscape and Literary Park		•	•	•			•	
	IL	Beit-She'an Valley		•	•	•			•	
	UK	Media tourism in Scotland	•	•	•	•			•	•

Although this clustering seems defendable, in our workshop on November 10th it was much discussed. The grouping into clusters originated from the project proposal, and was not further validated. The Main conclusion of the workshop was that eventual groupings of the case study areas should be guided by the

criteria to be assessed, rather than on a composite clustering. This will be further elaborated in 2022. In this report the clustering is used as proposed in the SPOT project proposal.

6.1. Research question 1

6.1.1. Tourists' behaviour and experience

First of all it should be noted that by far most of the tourists interviewed for this research were **nationals of the case studies** (Table 7). Only three case studies had a share of foreign tourists larger than 50%, 51%, 74% and 91% of foreign tourists for the Dutch, Slovenian and Spanish case studies respectively. Tourists' origins were of course influenced by the global COVID-19 pandemic and subsequent governmental measures, and consequently the results in this report were influenced as well. A result likely influenced by this is that the majority of respondents did not combine their trip with trips to other countries, as most were nationals travelling within their own country. The high share of foreign tourists in the Spanish case study could be caused by changed international travel rules and tourists 'getting used to' the situation and travelling more (the Spanish survey was conducted over a year later than in most other case studies). At the start of the pandemic it was more difficult to fly internationally, and tourists were likely more careful and choosing mostly domestic destinations.

Overall, the majority of respondents **stayed overnight** in the case study areas, as opposed to taking a daytrip, although the difference is not large in every case (Table 9). Most case studies are characterized as peripheral within their countries, which makes it an impractical destination for a daytrip. The Dutch case study of Kinderdijk, however, is situated centrally, with many big cities close by. This is reflected in the large proportion (80%) of tourists taking a day trip to the case study area, despite half of them being foreign tourists. These tourists have accommodation elsewhere and likely also spend money (e.g. on food) mostly outside the case study area.

In seven case studies, over **50% of tourists spent up to 50 euros** per person per day, and in five up to 100 euros (Figure 6). The only case study where considerably more was spent was the Beit She'an Valley in Israel. No patterns can be distinguished between the clusters. Expenditure per day is of course dependent on whether tourists have to pay for accommodation, which can explain why the Dutch case study had the largest share of tourists that spent up to 50 euros. Another factor for daily costs are the local prices of products and services, we did not use this information in this study.

The type of accommodations used varies per case study (Figure 7, right). **Hotels are most often used**, but also staying with friends or family, camping and using rented apartments are popular. However, the share of these accommodations differs per case study. In the more central areas of cluster A, AirBnBs appear to be more common, although they do not take up a very large share. Staying with friends or family is also a commonly used option in these case studies, besides hotels. In the more peripheral areas in cluster B and C, hotels, camp sites and rented apartments are the most used accommodations.

Most respondents used their **own transport** to travel to, but also within, the case study areas (Figure 8). This is likely a direct consequence of the fact that most tourists were nationals and therefore can easily take their own car. In Barcelona (Spain) tourist mostly make use of airplane and public transport. Also COVID-19 could have led to a preference for traveling by own car. The use of own transport within the case study is lower, and is mostly replaced with travelling by foot and/or by bicycle. This pattern can be found for most case studies, and no additional pattern could be distinguished among the clusters.

Interestingly, the most used methods of obtaining information about the area are almost equal among the case studies (Table 10). By far most used are **search engines and getting information from other people**. No information is available on the use of user reviews on the websites of popular internet accommodation websites. Although the internet is thus very important in finding information, word-to-mouth still plays an important role. The more classical methods of obtaining information via travel agencies, brochures and tourist information centres are not common among the tourists interviewed, except for the Leichhardt Land

(Germany) and Media tourism in Scotland (United Kingdom), where tourists did obtain more information from brochures and/or tourist information centres. Perhaps age could be an explaining factor, as it correlates with the relatively higher age of the respondents in the German case study (section 3.1.4).

The dominant motivation to visit the destination for tourists in most case studies was **nature/landscape** (Figure 9). Although nature and landscape are of course connected to local culture, this connection is probably less clear to tourists. The second most chosen motivation on the other hand is 'local traditions/culture'. In nine out of fifteen case studies this was among the top 3. This indicates that the tourists that took the survey are indeed interested in local culture. No clear patterns can be distinguished among the clusters, but 'sport' was only a motivation to visit in cluster B (the Styrian Iron Route in Austria, the Leichhardt Land and Valley of Palaces and Gardens in Poland). A possible explanation can be that the rural and deindustrialised nature of these areas allows for outdoor sports, which attracts tourists.

6.1.2. Tourists' interest regarding cultural tourism

Tourist respondents were most interested in visiting cultural attractions such as **'historical sites and buildings', 'restaurants/food festivals', 'cultural heritage sites and buildings' and 'townscapes'** (Table 12). This was the case for all clusters. In general this corresponds with the responses on motivations to visit the area, although in cluster A 'local traditions/folklore' was an important motivation to visit, whereas this category did not make it into the top 3 when asked if respondents were interested in visiting cultural attractions. Probably in cluster A, being mostly central and urban areas, cultural attractions such as famous buildings, townscapes, and a large offer of restaurants are much more common and thereby more on the radar of tourists. Apart from 'townscapes', categories such as historical and cultural sites and buildings were not included in the question about tourists' motivations.

Among the least chosen cultural attractions were **'sport events'** (Table 13). However, as said above, sport was an important motivation to visit several case studies in cluster B (Figure 9). Sport of course is a very broad concept encompassing many different types of activities, and therefore the types of sports that attract tourists to the destinations (such as outdoor sports) are very different from those associated with sport events (e.g. soccer competitions). Another discrepancy is that tourists in the Greek Cyclades had religious motives to visit, but they were not interested in 'religious sites/events'. An explanation in the Greek case study report states that the religious motivations could be explained by Greek tourists celebrating religious holidays on the islands. It could be that the respondents did not equate religious holidays with religious events, and that therefore the question was misunderstood. Another reason could be that during the summer of 2020 religious' events were banned because of the COVID-19 pandemic and tourists did not visit such events at the time of surveying.

An important note with the above is that several teams interpreted the question not as 'interest in various cultural attractions, sites and events' but as 'satisfaction with cultural attractions, sites and events'. This alters the meaning of the question, and consequently also the respondents' answers.

Although in all case studies **over 50% of respondents is (very) satisfied** with the visit as a whole (Figure 10A), there do appear to be some differences among the clusters for satisfaction with the number of cultural activities (Figure 33). Respondents are on average more dissatisfied with the number of cultural activities in the clusters B and C. This is especially the case in the Beit She'an Valley (Israel). The case studies in cluster A
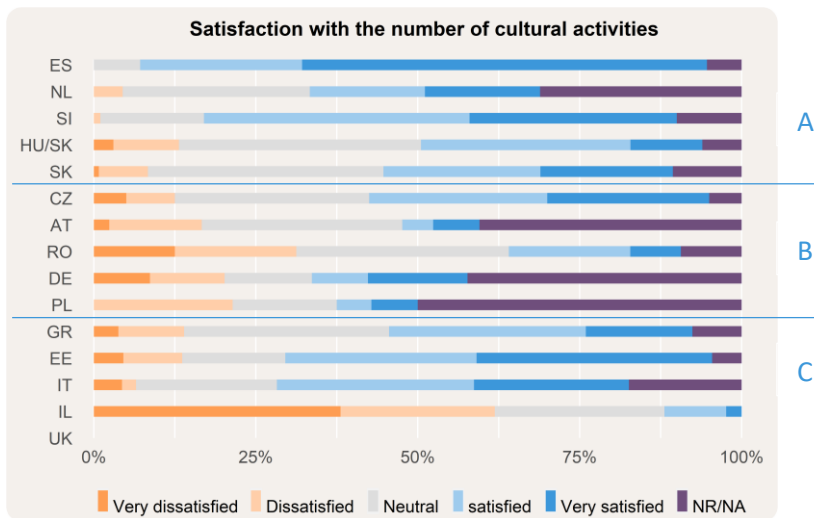
Figure 33: Tourist satisfaction with the number of cultural activities, ordered by case study cluster. NR/NA are the non-reply answers combined with the category 'not applicable'.

are mostly urban and central regions, including cities, and likely have a (much) larger offer of cultural activities than the remaining case studies, therefore this result is not surprising. However, in all clusters, but mostly in cluster B, the combined category of 'no reply', 'not applicable' and 'neutral' is very high. This could indicate that the question was not well understood. Results about satisfaction with the diversity of cultural activities are almost equal (Figure 10C).

Overall, tourists are mostly **(very) satisfied with the quality of products and services offered**, and with price/quality ratio (Figure 10D and E), although the proportion of respondents stating 'neutral' is also quite large in both cases. Average satisfaction rates are quite similar among the clusters, although satisfaction rates appear to be a bit higher in cluster C.

Figure 34: Tourist satisfaction with safety in the case study areas, ordered by case study cluster. NR/NA are the non-reply answers combined with the category 'not applicable'.

In most case studies, respondents were (very) **satisfied with safety** (Figure 34). This feeling of safety did not appear to be lower in the more urban and central areas of cluster A. The case studies in cluster C do seem to have a bit higher average feeling of safety.

The most important factors influencing a visit to a cultural attraction were personal interest, price and location (Table 14). This is the case in all three clusters.

Tourists seem to experience a **lack of information and communication** in almost all case studies (section 3.9). Also, the infrastructure and public transport leaves something to be desired in all clusters. Especially the lack of bicycle lanes was mentioned by respondents. However, several case studies stated a lack of responses when tourists were asked about missing facilities in the case study areas.

6.2. Research question 2

6.2.1. Residents' view

Overall, residents in the case studies viewed the categories '**historical sites and buildings', 'cultural heritage sites and buildings**' as the most important cultural attractions for their area (Table 17). These are followed by 'restaurants/food festivals', 'music events (concerts/festivals)', 'local traditions/folklore' and 'cultural routes'. These indications largely reflect the offer in the various case studies. Looking at the most chosen categories per cluster (Table 30), it appears that in group A the more tangible cultural attractions such as historical and cultural heritage sites and buildings are considered more often and important for the case study areas than in the groups B and C. Less tangible attractions such as local traditions/folklore, music events and gastronomy are more often seen as important in the clusters B and C. We see the following possible explanation for these findings. The case studies in cluster A are all seen as over-touristed, and likely contain more established and well-known tangible cultural attractions (e.g. the well-known wind mills in the Dutch case study or the famous Gaudí-designed buildings in Barcelona), therefore these are the more obvious choice for case study residents. Such attractions are possibly less clear in the remaining clusters, which could explain why intangible attractions are deemed more important.

Table 30: Number of times cultural attractions were chosen among the top three for the case study clusters A, B and C.

Category	A	B	C
Historical sites and buildings	4	4	2
Cultural heritage sites and buildings	5	1	3
Restaurants/food festivals		2	2
Music events (concerts/festivals)		2	2
Local traditions/folklore		2	2
Cultural routes	2	2	1
Townscapes	1	1	2
Health sites (e.g. spas/hot springs)	1		
Museums	1		
Film/theatre	1		1
Religious sites/events		1	

The least chosen categories were more equally divided among the case studies and clusters, with religious sites/events and dance events being the attractions deemed least important (Table 18).

When asked what residents see as cultural activities, sites, etc. in their area, specific sites were mentioned the most (section 4.2). These are **tangible types of attractions**, which is in line with the above results, as historical and cultural heritage sites and buildings were often among the top three. Residents also mentioned 'museums' quite often, however this category did usually not make it to the top three. Museums are again a very tangible type of cultural attraction, however it could be that residents do not view these museums as very important for their area.

Important to mention is that **natural sites were often seen as a cultural activity/site** by the residents. This was not a category that respondents could choose from when asked what the most important cultural attractions were, which is likely a shortcoming of the survey. Nature/landscape appears to be an important part of culture in most case study areas. This is an important point that could be considered in any additional survey and discussion.

Residents can see **potential benefits as a consequence of (increased) cultural tourism** in their area (section 4.3). Mostly these benefits are of economic nature, as in an increased job offer, but also by selling products and services and improving quality of life.

Improvement of infrastructure was the second most mentioned benefit for residents. There are no clear differences among the clusters in potential benefits, as most residents in the different case studies had

similar ideas. However, in two of the most over-touristed areas in cluster A (the Dutch case study of Kinderdijk and the Spanish case study of Barcelona) several responses were regarding the high number of tourists visiting the areas. In Barcelona residents stated that they should be prioritized over tourists, for example by reinvesting in services and quality of life for residents. In Kinderdijk there were several mentions that benefits for residents are not possible, as tourism is currently too much of a nuisance.

6.2.2. Impact of (cultural) tourism

In seven out of fifteen case studies the **number of tourists in the area is considered (very) high**. No clear patterns can be distinguished among the clusters (Figure 35), although it is clear that in group A tourist numbers are seen as higher. However, this is mostly the case for the Dutch and Spanish case study, two areas which are considered highly over-touristed. In Nitra (Slovakia) tourist numbers are even seen as low. In other words, it does seem to depend greatly on the individual case studies whether tourist numbers are considered high or low.

Also, although in the Dutch and Spanish case studies this is likely the case, high tourist numbers do not necessarily mean that residents experience this negatively.
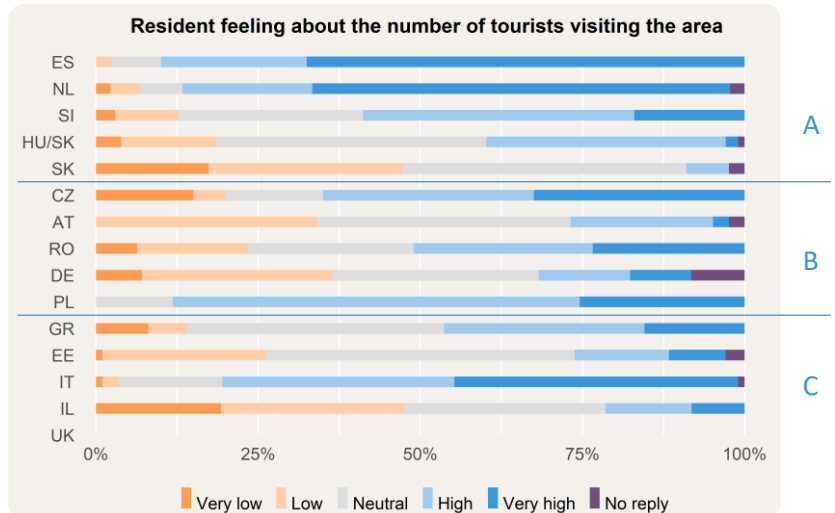
Figure 35: Resident feeling about the number of tourists visiting the area, ordered by case study cluster.

An indication for this can be that residents in most case studies feel **(very) positive about the impact of an increase of cultural tourism** (Figure 36). Only in the Dutch case study of Kinderdijk over 50% of resident respondents feel (very) negative about an increase. Also in the Spanish and Slovakian case studies, the share of people feeling (very) positive about an increase is lower. Comparing the clusters, it appears that in cluster A residents tend to view the impact more negatively than in cluster B and C. In Cluster C, respondents are
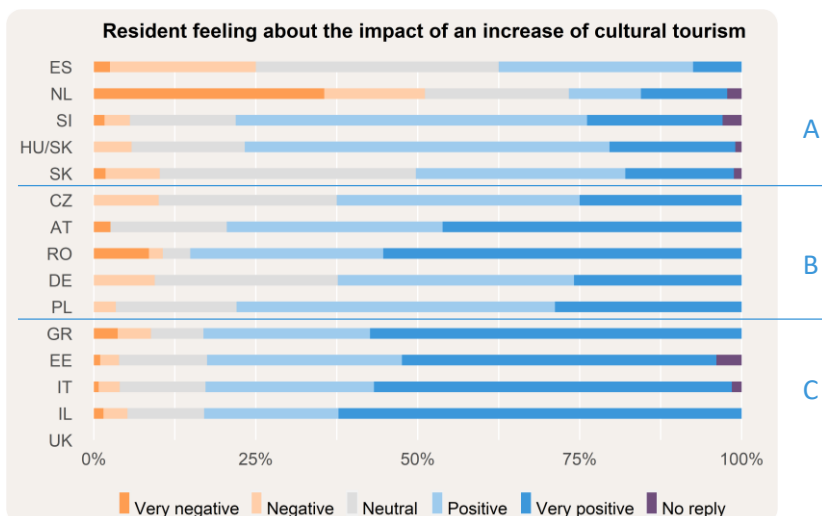
Figure 36: Resident feeling about the impact of an increase of cultural tourism on the area (for example on infrastructure, jobs, quality of life) , ordered by case study cluster.

most positive about the impact of an increase in cultural tourism. However, the differences between clusters are not clear and could be coincidental, so no conclusions can be drawn from them.

In all case studies over 50% of resident respondents feel that **tourists have an impact on local traditions** (Figure 17, left). Again no clear patterns can be distinguished among the clusters. In cluster A, comprising the case studies that suffer from over-tourism, only in the Dutch and Spanish case studies residents clearly feel there is a (very) negative impact of tourists on local traditions. As became clear from previous results, this is likely a consequence of the very high tourist numbers in these areas (pre-COVID-19). The residents in the remaining case studies in cluster A do not feel the same. Overall, residents are positive about the impact of tourists on local traditions (Figure 17, right), which is a very interesting result. This is possibly caused by an economic impulse that tourists bring, willing to spend money on local products and services. Also, tourists' interest in local traditions and folklore (although these were not always seen as very important for the case study areas) could increase the feeling of a local identity of the residents and show the importance of preserving heritage and local culture.

However, it is obvious that tourists can also bring nuisance, especially in higher numbers. Examples of these are noise pollution, garbage and disrespectfulness. In the Dutch case study for example, tourists are reported to enter private gardens and use drones for filming, which is a privacy impact for the local residents. In most case studies the impact of such tourism-related nuisance on daily life is seen as very small (Figure 18). Thus, even when tourist numbers are viewed relatively high in most areas (Figure 35), **nuisance does not seem to be an issue in most places**. In cluster A residents seem to suffer more from tourism, although this is only the case in the Spanish case study of Barcelona and the central area of Ljubljana (Slovenia). This question unfortunately and unintentionally did not make it into the Dutch survey so there is no data for the Kinderdijk case study. However, from the answers on the open questions in the survey (e.g. concerning excessive parking) it is likely that the result would have been similar to the Spanish and Slovenian case studies. Overall, apart from the case studies of Barcelona and Kinderdijk, impacts of (cultural) tourism are generally seen as positive and tourism nuisance does not seem to be much of an issue.

6.3. Research question 3

6.3.1. Current situation

The types of businesses interviewed per cluster is shown in Table 31. More accommodations, and fewer restaurants were surveyed in cluster B, whereas relatively more restaurants were surveyed in cluster A. In cluster C, more businesses were interviewed in the category 'other', which were mostly museums and farms/vineyards (section 5.1.2).

Table 31: Distribution of businesses surveyed, in percentages of the total per cluster

Cluster	Attraction (%)	Accommodation (%)	Restaurant, cafe or bar (%)	Other (%)	No reply (%)
A	13	38	31	17	1
B	22	44	20	10	5
C	16	34	14	23	12

The type of tourist most common in almost all case studies were **families and couples/travelling alone** (Table 22). This is the case in all case study clusters. Outdoor/adventure searching was more common in cluster B, which corresponds to the motivations of tourists visiting those case study areas (Figure 9). As stated in section 6.1.1, the urban and peripheral nature of these areas likely is suitable for outdoor sports. Special interest tourism was more common in cluster C, indicating that tourists are attracted to the specific activities that these case studies offer. This could also be related to the types of businesses interviewed. Relatively more businesses in the category 'other' were interviewed here, which are usually more special-interest types of businesses such as museums and vineyards.

However, although interesting to know the type of tourists that visit the area, the quality of the question asked to the entrepreneurs in this survey was probably not good enough. Categories such as 'families' and 'outdoor/adventure searching' are very different in nature and definitely do not exclude each other. This question would have been better split up in two different questions.

Surveyed entrepreneurs in most case studies appear to rely largely (> 50%) on **income from domestic tourists** (Table 32). Despite this general trend, some comments can be made regarding the clusters, although individual differences between case studies can be large also within clusters.

Table 32: Share of businesses per case study with an estimated share of income from domestic tourism below or above 50%, in percentages of total businesses surveyed per case study. For each cluster, the total shares of businesses are given as well.

Cluster	Country	< 50%	> 50%	No reply
A	ES	78	22	0
	NL	56	44	0
	SI	40	25	35
	HU/SK	52	48	0
	SK	4	93	2
	Total	**43**	**48**	**9**
B	CZ	30	58	13
	AT	10	40	50
	RO	2	92	6
	DE	0	91	9
	PL	18	79	3
	Total	**9**	**82**	**9**
C	GR	61	39	0
	EE	26	74	0

Cluster	Country	< 50%	> 50%	No reply
	IT	34	24	42
	IL	25	75	0
	UK	-	-	-
Total		**36**	**33**	**30**

The case studies in cluster B seem to rely predominantly on domestic tourism. These case studies consist of mostly rural and peripheral areas, and are under-touristed. These case study sites are much less well known international tourist attractions, so this is not a surprising result. Cluster C also contains areas that are often rural and peripheral. However, in this cluster the individual differences are very large between the case studies which evens out the total proportions. In the Greek Cyclades entrepreneurs are much more dependent on foreign tourism than in the Ida-Virumaa (Estonia) and the Beit She'an Valley (Israel). The Italian case study had a lot of no-replies, looking at the total of entrepreneurs that answered the question it appears that this area is also quite dependent on foreign tourists. In the central, urban and over-touristed case studies in cluster A we see a larger dependence on foreign tourists, as over 40% of businesses in four of the case studies rely mostly on income from foreign visitors. Such values are otherwise only found in the Greek Cyclades.
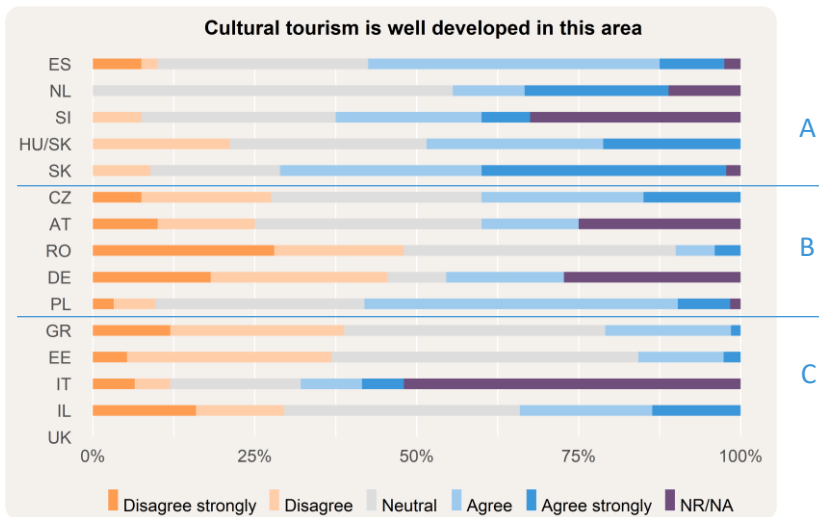
Figure 37: Agreement with the statement 'cultural tourism is well developed in this area', ordered by case study cluster. NR/NA are the non-reply answers combined with the category 'not applicable'.

Entrepreneurs clearly feel that **cultural tourism is better developed** in the central and urban areas of cluster A (Figure 37). This is as expected, as all five contain cities. In the remaining clusters more entrepreneurs feel that **cultural tourism is not well developed**, although the share of entrepreneurs that do not have an opinion on this ('neutral') is also quite large in most case studies. It could be that the definition of cultural tourism was not clear enough to answer the question, or it is not in their interest that more tourism offer would be promoted. In all case studies, entrepreneurs mostly feel that it is important that cultural tourism is present in the area (Figure 23, left). Therefore, especially in the case studies of cluster B and C, there is opportunity for the development of cultural tourism.

However, although many entrepreneurs feel that cultural tourism is not well developed in their area, on average they appear to feel more positive about whether there are enough cultural attractions in their areas (Figure 38). This is the case in all clusters, although not in all case studies. It could be that although the surveyed entrepreneurs do see (enough) cultural attractions in their area, these attractions are not well developed. Again, as can be expected, entrepreneurs in cluster B and C feel less strongly about whether there are enough attractions. Similar results can be found when entrepreneurs were asked about the diversity of cultural attractions in their area (Figure 24, right). In other words, many entrepreneurs, in most case studies,

feel there are both enough and a good diversity of cultural attractions, although perhaps these are not well developed.
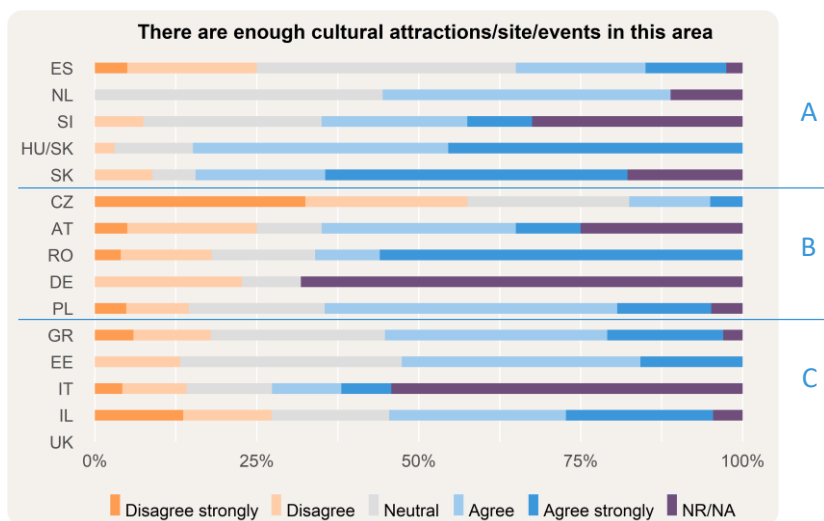
Figure 38: Agreement with the statement 'there are enough cultural attractions/sites/events in this area', ordered by case study cluster. NR/NA are the non-reply answers combined with the category 'not applicable'.

Entrepreneurs were asked several questions about the visitors they are receiving. Overall, it does not become clear from the results whether visitors are willing to spend a bit extra in order to support the local economy (Figure 28A). On average, entrepreneurs in cluster B appear more positive about their visitors' willingness, but individual case study differences are large. The share of entrepreneur respondents not replying or stating 'not applicable' is also quite high, and for most case studies at least a quarter answered 'neutral'. This could be an indication that many entrepreneurs are not able to tell this about their visitors, or that the question was not clear to them. In all case studies the majority of respondents feel it is **important for their visitors to get a taste of local culture and traditions** (Figure 28B). In most case studies, entrepreneurs see that visitors spend part of their time visiting cultural attractions (Figure 28C), but, although individual case study differences are large, this seems less strong in cluster A. Again, the level of respondents answering 'neutral' is quite large in most case studies, so it could be that entrepreneurs are not able to tell this about their visitors. The statement about whether tourists visit the area specifically because of its cultural appeal yielded similar poor results (Figure 28D).

On the whole, it seems that entrepreneurs feel that their visitors are interested in local culture and traditions and they spend part of their time visiting cultural attractions. However, the entrepreneurs report that the tourists do not always choose the area specifically because of its cultural appeal, and are also **not always willing to spend a bit extra to support the local economy**. It appears that in the urban areas of cluster A entrepreneurs feel their visitors are somewhat less interested in visiting cultural attractions. However, individual differences between the case studies are large.

In most case studies there does **not seem to be a lot of cooperation between tourism businesses** (Table 26). When there is cooperation, this is mostly in the form of joint activities, shared cultural itineraries and routes, and shared marketing strategies. In most cast studies, the share of entrepreneurs stating no cooperation between their business and the cultural sector is larger than those stating cooperation (Figure 29A). No pattern can be distinguished between the clusters. The share of respondents stating 'not applicable' or not replying is quite large however, which indicates the question might not have been well understood by many. When asked whether there is cooperation between tourism businesses in their area in general and the cultural sector it seems entrepreneurs are less sure (Figure 29C). On average, the share of respondents disagreeing (strongly) and agreeing (strongly) are not far apart and again the level of 'not applicable'/'no reply' and 'neutral' is large. It is likely that entrepreneurs simply do not know.

6.3.2.   Future potential

In all case studies the majority of entrepreneurs feel that **tourist numbers should be higher in the area** (Figure 39). This is, except for Barcelona (Spain) even so in cluster A, where the case studies are characterized as over-touristed. This result is not surprising, as tourism businesses depend on tourists for their income. In cluster C however, the share of entrepreneurs disagreeing (strongly) is much higher than in the remaining case studies. It could be that these entrepreneurs are satisfied with the number of tourists they currently receive, fearing negative impacts of over-tourism on their businesses.
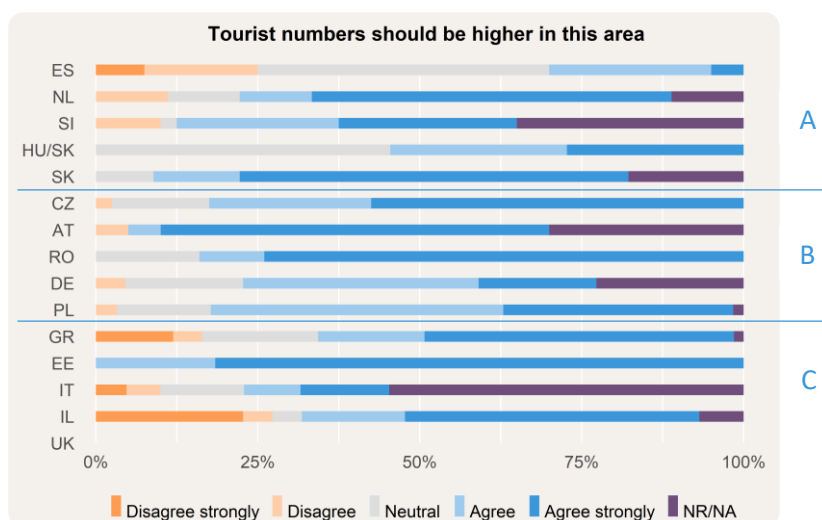
Figure 39: Agreement with the statement 'tourist numbers should be higher in this area', ordered by case study cluster. NR/NA are the non-reply answers combined with the category 'not applicable'.

On the other hand, the majority of respondents also feel that **tourist numbers should be better regulated** in the area (Figure 25, right). In the case of cluster A this would not be a surprising result, however, this result is also seen in practically all of the remaining under-touristed case studies. Also, Figure 39 shows that at the same time entrepreneurs feel that tourist numbers should be higher. Perhaps, even if the number of tourists currently does not reach high numbers, they still aggregate in parts of the case study areas, and that is why entrepreneurs feel that the flow should be better regulated.

In all case studies, the majority of entrepreneur respondents feel that their respective areas have **a lot of potential for cultural tourism** (Figure 26, left). Likewise, they feel there are still unexploited locations/traditions with potential as a cultural attraction in their area (Figure 26, right). For both statements however, three case studies in cluster C (the Greek Cyclades, Piedmont Landscape and Literary Park in Italy, and the Beit-She'an Valley in Israel) have more respondents disagreeing (strongly) with this statement than in the other case studies. Also in Barcelona more respondents disagree strongly. Here apparently, although the majority still feels there is potential for cultural tourism, opinions are more divided.

Overall, entrepreneurs see the most **potential for economic improvement** in development of transport infrastructure, publicity/marketing and information provision to tourists (Table 25). A lot can thus be improved in the promotion of businesses. As was shown in Table 23 currently the three most used methods by entrepreneurs to promote themselves are their website, social media and word of mouth. Either these methods can be developed to reach more people, or additional methods of promotion can be employed. Transport infrastructure and accessibility is a recurring theme among all case studies, and tourists, residents and entrepreneurs alike. In most places, there appears to be a lack of proper infrastructure, and the quality of existing infrastructure could be improved.

In all case studies most entrepreneurs feel (strongly) that **government should help** developing and increasing cultural tourism (Figure 27, left), and that government should invest in the development (Figure 27, right). Again, the three case studies from cluster C mentioned previously (the Cyclades, Piedmont Landscape and

Literary Park, and the Beit-She'an Valley), plus Komárom/Komárno (Hungary/Slovakia), have the highest share of respondents disagreeing (strongly) with these statements. These entrepreneurs do not feel government has a role in the development of cultural tourism, they **mistrust governmental intervention** or perhaps they feel that cultural tourism does not require additional development in their area.

Overall, it appears that entrepreneurs in most case studies feel that there is potential in more cooperation between their business and the cultural sector, and tourist businesses in general and the cultural sector (Figure 29B and D). However, for these statements too, the share of 'not applicable', 'no reply' and 'neutral' was quite high which could mean that respondents did not quite know how to answer this question.

The results from the open question on what could be improved in the area in order to improve the experience for both tourists and their businesses (see section 5.5.2) were in accordance with the results discussed above. Firstly, entrepreneurs stated that they **expect more from local authorities** (e.g. financial support, improving infrastructure, making information available and providing services). This corresponds with the result that most entrepreneurs feel that government should help and invest in cultural tourism. Second, **infrastructure is inadequate** in many case studies and should be improved. As stated before this is a recurring theme. Suggested was not just the improvement of existing roads or creating new road connections, but also to create bicycle lanes, sidewalks and hiking trails. Public transport is also inadequate is many cases. Infrastructure therefore is a very important topic that has the power to increase greatly the experience for tourists, and the economic situation for businesses. Third, topics such as **promotion, advertising, and communication** were repeatedly mentioned. This was seen before when publicity/marketing and information provision to tourists were among the most important factors that could, according to entrepreneurs, result in economic improvement. Lastly, entrepreneurs stated that there should be more cooperation between authorities, the private sector and the cultural sector. This is also in accordance with previous results.

6.4.   Central question

The **lack of proper infrastructure and public transport** is a recurring theme among responses from tourists, residents and entrepreneurs. Tourist respondents found that infrastructure and accessibility could be improved, and there often is a lack of bicycle lanes. Adequate infrastructure and public transport is also seen as a benefit for local residents. For entrepreneurs the quality of the roads is inadequate, and roads and connections are missing. They also find a lack of bicycle lanes, sidewalks and hiking trails and a lack of proper public transport. Entrepreneurs see improvement of infrastructure as an important factor for economic improvement in their respective case studies. Infrastructure therefore is an important theme with a lot of potential for improving the experience for tourists, residents and entrepreneurs alike.

Both tourists and entrepreneurs often feel there is **not enough information and communication** provided towards tourists. Tourists stated a lack of information offered, and there was not enough communication of information to tourists (such as advertising and promotion of sites and activities). Entrepreneurs feel similar: promotion, advertising and communication leaves room for improvement. For example, an absence of proper road and information signs and markings is reported. Both publicity and marketing, and information provision to tourists are also seen as important factors that can lead to economic improvement by entrepreneurs. Information, communication and the promotion of activities and locations is therefore also an important theme that has the potential to enhance the experience for tourists and lead to improved revenues for businesses.

Currently, entrepreneurs mostly use their website, social media and word of mouth as means of promoting their businesses. Tourists mostly use search engines and other people as sources of information, but also social media is regularly used. These methods are in agreement with each other, but it is possible that **the tourist and the entrepreneur still cannot find each other easily**. For example, websites could be only in the local language, or not pop up in the search engines when tourists are researching their destination. Also, information on websites could be meagre or unattractively displayed.

Residents also see economic benefits from cultural tourism. They can profit from an increased job offer, or by selling products and services. Improving facilities for tourism can also improve quality of life for residents. However, especially in areas with a lot of tourists, residents should not be forgotten and revenues from tourism could be reinvested in improving services and quality of life for residents.

Nature/landscape is an important motivation of tourists to visit the destination in most case studies. Natural sites were also mentioned often by residents when asked what they saw as cultural activities and sites in their area. Local culture and the surrounding landscapes are closely connected, and residents appear to realize this. The nature and landscapes of the case study areas are big attractors, although it is not clear whether tourists were indeed motivated by the cultural value of the landscapes.

Local traditions/culture is also an important motivation of tourists in nine out of fifteen case studies, including tourists visiting destinations in cluster A. However, when asked in what cultural attractions tourists were most interested, local traditions/culture did not make it to the top 3 in cluster A. Also residents of cluster A are less likely to state local traditions/culture as an important cultural attraction for their area. It seems that in cluster A, consisting mostly of urban and central regions with a lot more tourism than the remaining case studies, more tangible attractions such as historical and cultural heritage sites and townscapes are more likely to be interesting to tourists. Possibly this is because these are often famous. In cluster B and C residents viewed gastronomy as more important to their area than in cluster A. However, tourists in cluster A are interested in visiting gastronomy establishments as well, although this is less clear when looking at the top 3 motivations.

On the whole, tourists do definitely appear interested in visiting cultural attractions and sites. This is also seen by entrepreneurs. Most entrepreneurs in all case studies agree that it is important for their visitors to get a taste of local culture and traditions and that their tourists spend part of their time visiting cultural attractions.

Entrepreneurs in general, although less so in clusters B and C, feel **quite positive** both about the number and the diversity of cultural attractions in their area. At the same time entrepreneurs feel that cultural tourism is not well developed, mostly in clusters B and C. Tourists on the other hand, are **not always satisfied** with the number and diversity of cultural activities. Although many still are, especially in cluster A, tourists visiting destinations of cluster B and C are clearly less satisfied about cultural activities. There appears to be a **discrepancy** here that could be further investigated.

Residents are more inclined to feel that tourist numbers are (very) high in their area than entrepreneurs. In seven out of fifteen case studies the number of tourists is seen by residents as very high. The majority of entrepreneurs on the other hand, feel that tourist numbers should be higher. **Residents and entrepreneurs of course have very different perspectives**, but still this seems to be something that should be kept in mind.

However, although they often feel tourist numbers are (very) high, in general residents do feel that the impact of an increase of cultural tourism would be (very) positive. This confirms results seen in the open question, where residents stated that economic benefits and improved quality of life were expected with an increase in tourism. Entrepreneurs also see value in the increase of cultural tourism, and see an important role for the (local) authorities to help and invest.

On the whole, there can be many similarities found in how tourists, residents and entrepreneurs experience and view cultural tourism. Of course, there are always differences, as each group has their own perspectives and wishes for the area they visit or live in.

Although we found patterns using the pre-defined clusters of case studies, these clusters do not appear clearly different in all aspects. Each case study has its unique characteristics, and any grouping is in a way artificial. Still, the **patterns observed do emphasize some clear tendencies** in the perception of cultural tourism by tourists, residents and entrepreneurs.

6.5. COVID-19 results

Each survey had some additional questions regarding the global COVID-19 pandemic and the effect this had on each group. In this section these results are discussed.

6.5.1. COVID-19 and tourists

Way of travel was changed (very) much by the majority of tourists interviewed for this study. Individual differences between the case studies occur, and could be explained by national COVID-19 measures that differed per country. Different ways of travelling are for example travelling domestic instead of abroad, a restriction of possible destinations, shorter holidays and fewer trips. This had also some positive sides, as **several tourists reported they discovered new places within their own countries**. Tourists stated also that they avoided large masses, visited less sites, avoided public transport and instead used more their own (or rented) transport. This last point can be confirmed by the results shown in Figure 8, where by far the most common method of transportation is own transport.

On the whole, there are many ways in which travelling was changed due to the COVID-19 pandemic. The level of change also depends on the local COVID-19 measures and restrictions.

6.5.2. COVID-19 and residents

It is interesting to know whether local residents were more inclined to visit cultural attractions and sites within their own surroundings during the COVID-19 pandemic. Therefore, it was asked whether they visited (much) less, (much) more or same as before a number of cultural attractions (same categories as in section 4.2). As stated in section 4.6, in most case studies the **majority of respondents visited most cultural attractions (much) less than before**. This is less the case for cultural attractions in public spaces (such as townscapes) and more so in attractions that are inside (such as art galleries) or usually have many people in close proximity (such as music events). Another pattern can be seen for the different case studies, some case studies (e.g. the Beit-She'an Valley in Israel, or the city of Barcelona in Spain) have consistently higher proportion of respondents stating they visited the attractions (much) less, regardless of which kind of activity it was. Therefore, it seems that these patterns are mostly guided by the, in some cases, very strict COVID-19 restriction policies, implemented by the respective governments. These policies, where sites and services were closed and lockdowns implemented, prevented events from occurring and people from leaving their houses and undertaking activities.

6.5.3. COVID-19 and entrepreneurs

Businesses were not affected equally by the COVID-19 pandemic in different case studies. In some areas over 90% of businesses was affected, whereas in others this was 'only' 40%. Probably this too can be explained by the different COVID-19 policies and measures implemented by the local governments. Governmental support also differed per country. In some case studies businesses received financial support, e.g. loans or help with salaries of personnel, whereas in other case studies this was not the case.

In order to decrease the negative effects of the pandemic entrepreneurs took measures such as maintaining connections with customers, enhancing existing digital services and advertising as normal. Measures such as developing new products or exploring new markets were least used. Additional measures were taken regarding personnel, these were for example not hired or furloughed with (partial) pay. Half of the entrepreneurs stated that their business could be sustained under the present (last summer 2020) circumstances for less than 6 months.

For most case studies, the **reduced international visitor numbers had a stronger impact** than reduced national tourist numbers. This can be explained by the fact that, as we have also seen in this study, tourists travelled much more within their own countries.

The majority of businesses in all case studies were affected by cancelled events, but the effect of forced closure was not equally strong in the different case studies. This can be explained by **restrictions by local governments, that differed per country**.

On the whole, COVID-19 has had a very large impact on entrepreneurs in all case studies, as can only be expected. When we created the survey it was the spring of 2020, and we had no idea yet what the summer would look like. At the time, many COVID-19 restrictions were not in place yet, so in hindsight many results of this survey are obvious.

6.6. Conclusions

The main objective of this study is to describe and analyse information of tourists' experiences and the views of residents and tourism entrepreneurs on the current situation and future potential of cultural tourism. Data collected during the first COVID-19 summer in fifteen different case study areas were used for assessment individually or as part of a cluster (under- or over-touristed, deindustrialised, urban and/or rural, remote peripheral or central). Three separate questionnaire surveys were conducted in each case study: for tourists, residents and tourism entrepreneurs. With these surveys we aimed to answer the following question: what similarities and differences exist in tourists', residents' and entrepreneurs' experiences and views on cultural tourism in different case study areas and what are the potentials of cultural tourism?

It should be kept in mind that COVID-19 restrictions have had an overwhelming impact on tourism in general and cultural tourism specifically in the period of study (mainly 2020). Cultural tourism was in many cases reduced to less than 50% or even less than 20% of day visits compared to earlier years, which evidently disrupted the tourism sector in many ways.

Still, we report the following findings:

- Transport infrastructure is considered an important issue with a lot of potential for improving the experience for tourists, residents and entrepreneurs alike.
- Both tourists and entrepreneurs often feel there is not enough information and communication provided towards tourists, although the mismatch in the way businesses promote themselves and tourists find them is interesting and can be presumed one of the main findings of the study.
- Most residents see the economic benefits of cultural tourism. They can profit from an increased job offer, or by selling products and services. Improving facilities for tourism can also improve quality of life for residents. However, with increasing tourist numbers, residents should not be forgotten as they will have a different perspective on tourism than other target groups and stakeholders such as entrepreneurs.
- On the whole, tourists do definitely appear interested in visiting cultural attractions and sites. Local traditions/culture is an important motivator of travelling to a certain destination and it is important for most visitors to get a taste of local culture and traditions.
- Tourists are generally less satisfied about the number and diversity of cultural attractions than tourism entrepreneurs, who feel quite positive.
- On the other hand, entrepreneurs often feel that cultural tourism is not well developed in their case studies.
- In the urban and central case studies both tourists and entrepreneurs appear to be more satisfied about the cultural offer, and entrepreneurs also are more positive about the state of development.
- Residents are more inclined to feel that tourist numbers are (very) high in their area than entrepreneurs, this is even the case for residents of areas that are seen as under-touristed. However, in general, most residents (except in mass-tourism areas) do feel that the impact of an increase of cultural tourism could be (very) positive. Also entrepreneurs see value in the increase of cultural tourism, and see an important role for the (local) authorities to help and invest. They tend to feel that tourist numbers should be higher in the area.
- COVID-19 restrictions have generally led to serious reductions especially in the numbers of foreign tourists, affecting up to 90% of tourist businesses.

Although we found patterns using the pre-defined clusters of case studies, these clusters do not appear clearly different in all aspects. Each case study has its unique characteristics, and any grouping is in a way artificial. Still, the patterns observed do emphasize some clear tendencies in the perception of cultural tourism by tourists, residents and entrepreneurs.

Therefore, despite the database resulting from the surveys described in this report being far from perfect (see section 2.5), it would be interesting to explore whether a multivariate analysis of (a part of) the data would be feasible, to arrive at a clustering of case studies with comparable characteristics. This might also

give indications on the most relevant shortcomings in tourism policies and opportunities for cultural tourism in various types of tourist destinations.

6.7. Policy Implications and Recommendations

In doing research and making policy for cultural tourism, there is usually a large focus on tourists as consumers and entrepreneurs as producers of cultural tourism. This approach is a result of the traditional definition of cultural tourism. A strict separation of target groups is often used in research (also in interviews and surveys) and policy, where a distinction is made between tourists and entrepreneurs. There is also an increasing focus on residents. With the growing attention for sustainable cultural tourism, the awareness of local entrepreneurs and local residents has grown. The experiences of these target groups are still too little used in policy and those experiences and views, which may differ among target groups, are usually not compared with each other. The policy for cultural tourism could be reinforced by involving the experiences of these groups more strongly and letting go of more traditional views.

The following recommendations can be formulated from the above signals and analysis in the section of the conclusions:

- Focus more on the development of (transport) infrastructure, where there is often a lot of potential for improvement. Extra attention should be paid to the user experience of tourists and locals. Also important is the availability of information, which should be tailored to the visitor. It is necessary to develop sustainable and accessible infrastructure, in the broad sense, so not just for (public) transportation but also infrastructure for the provision of water, energy and for digital technologies.

- Provide more information and better communication to tourists. Tourists, entrepreneurs and residents should be surveyed to gain insight in which way information is best communicated and offered. Such surveys should be concise and purposeful.

- The tourism optimization tool developed within this project (the SPOT-IT tool) will serve as part of the infrastructure required to cover the gaps notified particularly by tourists and business owners. So the SPOT-IT tool can be used for further research to reduce the information gap for tourists.

- Increase focus on and involve local residents in the development of cultural tourism, even if their opinion about the growth of cultural tourism differs from that of entrepreneurs. To make this process more inclusive and legitimate, citizen involvement should be facilitated and stimulated (e.g. in the form of local initiatives). Cultural tourism can be used as a driver to increase economic and social benefit among the local community, and therefore national and regional governments should regulate economic activity and balance large companies and local entrepreneurs. Spatial planning and labour and tax policies can be instruments in achieving economic and social benefit for the local community.

- Increase the digital offer of information (such as a digital preview of a site or building) to improve visibility of cultural attractions, sites, activities, and even local traditions and culture. To promote "unity in diversity" at EU level, a platform focussing on exchange of good practices in cultural tourism could be established at the EC's DG Culture in collaboration with DG Regional and Urban Policy. This platform should be accessible and structured according to the interest of the various actors. Monitor whether and how the offered information leads to more tourists and whether tourists share their information and experiences with other potential tourists.

- Show tourism entrepreneurs, who feel quite positive about the number and diversity of cultural attractions, that tourists are generally less satisfied. Channels can be established linking tourists and entrepreneurs to measure tourists needs and to motivate entrepreneurs to be more involved in cultural tourism activities. Public private partnerships can enhance local offer. To involve all target groups, participatory decision making should be applied. Investigate what kind of attractions tourists

are missing and encourage and support entrepreneurs to continuously develop new tourist attractions.

- Organize meetings among local entrepreneurs, to investigate how cultural tourism can be improved. Measures are necessary to protect 'uniqueness' without complete commodification. Cultural tourism should be used to promote the cultural fabric of the community. However, a mismatch between existing local identities and how they are marketed should be avoided.

- To promote cultural tourism, make a distinction between urban and rural areas, between central and peripheral areas and between over- and under-touristed areas. Investigative surveys should be (micro) area-specific to identify differences in for example over- and under-tourism. Invest in education on sustainability, starting from children.

- Make (as EU) a difference in promoting cultural tourism in over-touristed and under-touristed areas in cases of regional development. Create networks for residents and entrepreneurs in under-touristed areas to promote further development of cultural tourism. Create networks for residents and entrepreneurs in over-touristed areas to foster the discussion on how cultural tourism can grow without negative impacts for residents.

- Signals from researchers indicate that residents may find the impact of tourism to be very positive in terms of economic gain, jobs, etc., but they also tend to believe it is quite negative in terms of housing affordability (rising rents, AirBnBfication of the city) and that it can contribute to the loss of local cultural traditions and identity. It is both interesting and important to study these varied factors, especially if we are trying to improve the sustainability of tourism in a more comprehensive sense (i.e. not just economic), and enhance Europeanisation while cherishing diversity. Therefore it is interesting to do further research on topics such as rent prices, the availability and affordability of housing and impact on cultural traditions.

Finally, we reflect on the use of surveys as a research technique, in our case mainly questionnaire surveys. Surveys should be focused on the local level and address both private and public stakeholders (in a broad sense); to be effective and efficient (guaranteeing high response rates) and questionnaires should be short and purposeful. Surveys should not be used as the sole method of data collection. Do not forget that questionnaires may not give you all answers (in our case e.g. regarding sustainability). Surveys are snapshots and provide limited insight into why questions. Questionnaire surveys, on the other hand, have a greater reach in number and representativeness than, for example, interviews and offer more insight into the why-question than statistical data or big data. Interviews in turn provide more insight into the why questions than questionnaires, and big data are often less static (current trends instead of snapshots). The use of statistical data, big data and interviews are therefore valuable research techniques in addition to questionnaire surveys that can be used in scientific triangulation (combined use of research techniques), increasing insights by relating data to each other.

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8. Appendix

8.1. Tourist survey

SPOT
www.SPOTprojectH2020.eu

HORIZON 2020

Questionnaire for tourists

The SPOT project is a project funded by the European Union's Horizon 2020 program, which aims to develop a new approach to understanding and addressing cultural tourism and to promote the development of disadvantaged areas. The consortium consists of partners from 15 different countries and as a first step, the project is surveying tourists, residents, and tourism businesses from specific case studies within these 15 countries about their views and characteristics.

Cultural tourism traditionally focuses upon visiting "high art" museums and galleries. Our model of cultural tourism, by contrast, reflects a considerable widening of cultural tourism that more accurately reflects patterns of travel in the 21st century and digital revolution in travel as a way of accessing culture. This revolution has widened the meaning of culture to include landscape, media, ethnic cultures, gastronomy and amateur as well as professional collections. It reflects popular culture as well as high culture and therefore substantially extends the reach of cultural tourism.

For further information about the project, please visit http://www.spotprojecth2020.eu/

We would be very grateful if you would take the time to complete this questionnaire. This will help us to better understand cultural tourism in Europe, identify opportunities, and to design ways to promote the development of disadvantaged areas so that local residents can benefit from their precious cultural assets, or – in case of over-pressure of tourism – to protect their assets from damage by tourism.

The survey should take about 10 to 15 minutes to complete. During this survey we will often talk about 'this/the area'. This area comprises the specific case study about which you will answer the questions, in your case this is [......... As each partner has very different case study/case studies, we ask you to fill this in for your specific case. Each partner will know best what the correct and clearest description for their case study is.]

General characteristics

1. What is your gender?

   O Female   O Male   O Other

2. What is your age?

   _____

3. What is your country of residence? If different, what is your country of birth? If your country of residence is this country, go to question 4, else go to question 5.

   Residence: **Birth (if different):**

   _____   _____

SPOT ::::

4. If your country of residence is this country, where are you from?

   ○ **Local (from this region)**   ○ **A national (from another region in this country)**

5. How many years of education did you have (including compulsory education and any further professional training or advanced or academic studies)?

   _____ years

6. What is your profession?

   ○ **Managers**

   ○ **Professionals**

   ○ **Technicians and associate professionals**

   ○ **Clerical support workers**

   ○ **Service and sales workers**

   ○ **Skilled agricultural, forestry and fishery workers**

   ○ **Craft and related traders workers**

   ○ **Plant and machine operators, and assemblers**

   ○ **Elementary occupations**

   ○ **Armed forces occupations**

7. What is the total gross household income per year before taxes? Please choose just one category.

   ○ **Less than €10,000**   ○ **€60,000 - €80,000**

   ○ **€11,000 - €20,000**   ○ **€80,000 - €100,000**

   ○ **€20,000 - €40,000**   ○ **€100,000 - €120,000**

   ○ **€40,000 - €60,000**   ○ **More than €120,000**

8. Of how many persons your household consists?

   _____ persons

SPOT ⣿

Travel characteristics

9. Are you travelling alone or in a group?

   O **Alone**

   O **Couple**

   O **Family**

   O **Group (self-organized, e.g. friends)**

   O **Organized group travel**

   O **With co-workers or business partners**

   O **Other, namely _____**

10. What were your motivations to visit the area? You can check multiple boxes.

☐ gastronomy and/or wine	☐ (war) history/archaeology	☐ health
☐ festival(s) and/or nightlife	☐ nature/landscapes	☐ sport
☐ local traditions/culture	☐ business/work	☐ beach
☐ film/theatre/literature	☐ architecture/townscapes	☐ religion
☐ museums/art galleries	☐ other(s), namely _____	

11. Are you staying overnight in the area during your current visit? If yes, how many nights in total? Continue with question 12. If no, continue with question 14.

   O **Yes, _____ nights**   O **No**

12. What kind of accommodations are you using during your stay in the area? You can check multiple boxes.

☐ hotel	☐ rented apartment	☐ mountain lodging
☐ hostel	☐ camping	☐ Friends/relatives/acquaintances
☐ AirBnB	☐ farm	☐ other(s), namely _____

13. Are you combining your visit to this area with visits to other areas (day trips)? If yes, how many day trips did or will you make during your stay?

   O **No**   O **Yes, _____ day trips**

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14. Do you combine your visit to this area with travelling to other countries (before, during, or after your visit to this area)? If yes, how many other countries?

O   No   O   Yes, _____ countries

15. What are your estimated costs per person per day for your visit in the area (including accommodation costs)?

_____ €

16. How well can the area be reached from outside, and how easy is it to travel within the area on a scale from 1 (very difficult) to 5 (very easy)?

How easy to reach area from outside?	1	2	3	4	5	not applicable
How easy to travel within the area?	1	2	3	4	5	not applicable

17. What kind of transport methods did you use to get to this location and what kind of transport methods are you using to get around in the area? Please check the applicable boxes.

Type of transportation	To area	Within area
Airplane		
Public transport		
Organized tours		
Rented transport		
Own transport		
Taxi		
Boat		
Bicycle		
By foot		
Other, _____		

18. What kind of methods do you use to obtain information about the area? You can check multiple boxes.

☐ search engines   ☐ other people   ☐ recommendation by accommodation

☐ travel guides   ☐ social media   ☐ tourism fairs

☐ travel agencies   ☐ TripAdvisor   ☐ tourist information center

☐ brochures/posters   ☐ other(s), namely _____

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Opinion about cultural tourism in area

19. How satisfied are you with the following aspects on a scale of 1 (very dissatisfied) to 5 (very satisfied)?

The visit as a whole	1	2	3	4	5	not applicable
Number of cultural activities	1	2	3	4	5	not applicable
Diversity of cultural activities	1	2	3	4	5	not applicable
Quality of products and services offered	1	2	3	4	5	not applicable
Price versus offer	1	2	3	4	5	not applicable
Safety	1	2	3	4	5	not applicable

20. How interested are you in visiting any of the following cultural attractions/sites/events on a scale of 1 (not interested at all) to 5 (very interested)?

Museums	1	2	3	4	5	not applicable
Art galleries	1	2	3	4	5	not applicable
Historical sites and buildings	1	2	3	4	5	not applicable
Cultural routes	1	2	3	4	5	not applicable
Townscapes	1	2	3	4	5	not applicable
(Film) theatre	1	2	3	4	5	not applicable
Cultural heritage sites and buildings	1	2	3	4	5	not applicable
Restaurants/food festivals	1	2	3	4	5	not applicable
Music events (concerts/festivals)	1	2	3	4	5	not applicable
Dance events	1	2	3	4	5	not applicable
Local traditions/folklore	1	2	3	4	5	not applicable
Religious sites/events	1	2	3	4	5	not applicable
Sport events	1	2	3	4	5	not applicable
Health sites (e.g. spas/hot springs)	1	2	3	4	5	not applicable
Other, _____	1	2	3	4	5	not applicable
Other, _____	1	2	3	4	5	not applicable

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21. What factors influence your decision to visit a cultural attraction/site/event? Choose the three most important factors.

☐ price   ☐ physical accessibility   ☐ recommendation by accommodation

☐ location   ☐ social media   ☐ recommendation by other people

☐ personal interest   ☐ tourist card offer   ☐ inclusion in organized package

☐ other, namely _____

22. How likely are you to recommend visiting this area to others?
Very unlikely   **1 | 2 | 3 | 4 | 5**   **Very likely**

23. Are there specific cultural services, attractions, etc. that you are missing in this area? What would you like to see improved for tourists?
[Open question]

Tourism and the corona-pandemic crisis of 2020

24. Has the corona crisis changed the way you travel?
Very little   **1 | 2 | 3 | 4 | 5**   **Very much**

25. In what way has the corona crisis changed the way you travel?
[open question]

26. Have you visited the area before? If yes, please answer question 27 to 29 also.
O Yes   O No

27. What year was your most recent previous visit to the area?

_____

28. How satisfied were you in your previous visit(s) with the following aspects on a scale of 1 (very dissatisfied) to 5 (very satisfied)?

The visit as a whole	1	2	3	4	5	not applicable
Number of cultural activities	1	2	3	4	5	not applicable
Diversity of cultural activities	1	2	3	4	5	not applicable
Quality of products and services offered	1	2	3	4	5	not applicable
Price versus offer	1	2	3	4	5	not applicable
Safety	1	2	3	4	5	not applicable

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29. How does your current experience, during the corona crisis, of the area differ from previous experience(s)?

- O No difference
- O Experience was better before
- O Experience is better now
- O I cannot say

8.2. Resident survey

Questionnaire for residents

The SPOT project is a project funded by the European Union's Horizon 2020 program, which aims to develop a new approach to understanding and addressing cultural tourism and to promote the development of disadvantaged areas. The consortium consists of partners from 15 different countries and as a first step, the project is surveying tourists, residents, and tourism businesses from specific case studies within these 15 countries about their views and characteristics.

Cultural tourism traditionally focuses upon visiting "high art" museums and galleries. Our model of cultural tourism, by contrast, reflects a considerable widening of cultural tourism that more accurately reflects patterns of travel in the 21st century and digital revolution in travel as a way of accessing culture. This revolution has widened the meaning of culture to include landscape, media, ethnic cultures, gastronomy and amateur as well as professional collections. It reflects popular culture as well as high culture and therefore substantially extends the reach of cultural tourism.

For further information about the project, please visit http://www.spotprojecth2020.eu/

We would be very grateful if you would take the time to complete this questionnaire. This will help us to better understand cultural tourism in Europe, identify opportunities, and to design ways to promote the development of disadvantaged areas so that local residents can benefit from their precious cultural assets, or – in case of over-pressure of tourism – to protect their assets from damage by tourism.

The survey should take about 5 to 10 minutes to complete. During this survey we will often talk about 'this/the area'. This area comprises the specific case study about which you will answer the questions, in your case this is [......... As each partner has very different case study/case studies, we ask you to fill this in for your specific case. Each partner will know best what the correct and clearest description for their case study is.]

Please pay attention: questions refer to the general situation in this area, as it was **before** the corona pandemic this year, unless stated otherwise.

General characteristics

1. What is your gender?

   O Female   O Male   O Other

2. What is your age?

   _____

3. If you were not born in this country, what is your country of birth?

   _____

4. How many years of education did you have (including compulsory education and any further professional training or advanced or academic studies)?

    _____ years

5. In which of the following categories belongs your occupation? Please choose one category.

    O   **Managers**
    O   **Professionals**
    O   **Technicians and associate professionals**
    O   **Clerical support workers**
    O   **Service and sales workers**
    O   **Skilled agricultural, forestry and fishery workers**
    O   **Craft and related traders workers**
    O   **Plant and machine operators, and assemblers**
    O   **Elementary occupations**
    O   **Armed forces occupations**

6. What is the total gross household income per year before taxes? Please choose just one category.

    O   **Less than €10,000**   O   **€60,000 - €80,000**

    O   **€11,000 - €20,000**   O   **€80,000 - €100,000**

    O   **€20,000 - €40,000**   O   **€100,000 - €120,000**

    O   **€40,000 - €60,000**   O   **More than €120,000**

7. Of how many persons your household consists?
    _____ persons

8. What is your postcode?

    _____

Cultural tourism and residents

9. What do you see as cultural activities/sites in this area?
    [Open question]

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10. How important are the following cultural attractions/sites/events for this area on a
    scale of 1 (not important) to 5 (very important)?

Museums	1	2	3	4	5	not applicable
Art galleries	1	2	3	4	5	not applicable
Historical sites and buildings	1	2	3	4	5	not applicable
Cultural routes	1	2	3	4	5	not applicable
Townscapes	1	2	3	4	5	not applicable
(Film) theatre	1	2	3	4	5	not applicable
Cultural heritage sites and buildings	1	2	3	4	5	not applicable
Restaurants/food festivals	1	2	3	4	5	not applicable
Music events (concerts/festivals)	1	2	3	4	5	not applicable
Dance events	1	2	3	4	5	not applicable
Local traditions/folklore	1	2	3	4	5	not applicable
Religious sites/events	1	2	3	4	5	not applicable
Sport events	1	2	3	4	5	not applicable
Health sites (e.g. spas/hot springs)	1	2	3	4	5	not applicable
Other, _____	1	2	3	4	5	not applicable
Other, _____	1	2	3	4	5	not applicable

11. How well can the area be reached from outside, and how easy is it to travel within the
    area on a scale from 1 (very difficult) to 5 (very easy)?

How easy to reach area from outside?	1	2	3	4	5	not applicable
How easy to travel within the area?	1	2	3	4	5	not applicable

12. How do you feel about the number of tourists that visit the area each year?

    Very low   1 | 2 | 3 | 4 | 5   **Very high**

13. What kind of impact do you think that an increase of cultural tourism has on the
    area (e.g. infrastructure, jobs, quality of life)? Please circle the right number

    Negative impact   1 | 2 | 3 | 4 | 5   **Positive impact**

14. Do you receive any discounts as a local to attend cultural attractions/events/sites?

    No discounts   1 | 2 | 3 | 4 | 5   **Many discounts**

15. Do you often give tips to visitors about cultural attractions/events/sites?

    No tips   1 | 2 | 3 | 4 | 5   **Many tips**

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16. Is there impact of tourism on local traditions? And if yes, what kind of impact?

O   **No**

O   **Yes:**   **Very negative**   **1** | **2** | **3** | **4** | **5**   **Very positive**

17. What is the impact of tourism-related nuisance (e.g. loud tourists, parties, garbage, disrespectfullness etc.) on your daily life?

Very small   **1** | **2** | **3** | **4** | **5**   **Very large**

18. How likely are you to recommend visiting this area to others?

Very unlikely   **1** | **2** | **3** | **4** | **5**   **Very likely**

19. How can residents profit from cultural tourism?

[Open question]

Residents and Corona

20. The coronacrisis made it more difficult to travel long distances. Do you currently (since the crisis started in March 2020) visit cultural sites and participate in cultural activities in your own surroundings more than before the corona crisis on a scale from 1 (I visit much less) to 5 (I visit much more) with 3 being neutral (I visit the same as before)?

Museums	**1**	**2**	**3**	**4**	**5**	not applicable
Art galleries	**1**	**2**	**3**	**4**	**5**	not applicable
Historical sites and buildings	**1**	**2**	**3**	**4**	**5**	not applicable
Cultural routes	**1**	**2**	**3**	**4**	**5**	not applicable
Townscapes	**1**	**2**	**3**	**4**	**5**	not applicable
(Film) theatre	**1**	**2**	**3**	**4**	**5**	not applicable
Cultural heritage sites and buildings	**1**	**2**	**3**	**4**	**5**	not applicable
Restaurants/food festivals	**1**	**2**	**3**	**4**	**5**	not applicable
Music events (concerts/festivals)	**1**	**2**	**3**	**4**	**5**	not applicable
Dance events	**1**	**2**	**3**	**4**	**5**	not applicable
Local traditions/folklore	**1**	**2**	**3**	**4**	**5**	not applicable
Religious sites/events	**1**	**2**	**3**	**4**	**5**	not applicable
Sport events	**1**	**2**	**3**	**4**	**5**	not applicable
Health sites (e.g. spas/hot springs)	**1**	**2**	**3**	**4**	**5**	not applicable
Other, _____	**1**	**2**	**3**	**4**	**5**	not applicable
Other, _____	**1**	**2**	**3**	**4**	**5**	not applicable

8.3. Business survey

Questionnaire for tourism businesses

The SPOT project is a project funded by the European Union's Horizon 2020 program, which aims to develop a new approach to understanding and addressing cultural tourism and to promote the development of disadvantaged areas. The consortium consists of partners from 15 different countries and as a first step, the project is surveying tourists, residents, and tourism businesses from specific case studies within these 15 countries about their views and characteristics.

Cultural tourism traditionally focuses upon visiting "high art" museums and galleries. Our model of cultural tourism, by contrast, reflects a considerable widening of cultural tourism that more accurately reflects patterns of travel in the 21st century and digital revolution in travel as a way of accessing culture. This revolution has widened the meaning of culture to include landscape, media, ethnic cultures, gastronomy and amateur as well as professional collections. It reflects popular culture as well as high culture and therefore substantially extends the reach of cultural tourism.

For further information about the project, please visit http://www.spotprojecth2020.eu/

We would be very grateful if you would take the time to complete this questionnaire. This will help us to better understand cultural tourism in Europe, identify opportunities, and to design ways to promote the development of disadvantaged areas so that local residents can benefit from their precious cultural assets, or – in case of over-pressure of tourism – to protect their assets from damage by tourism.

The survey should take about 20 to 30 minutes to complete. During this survey we will often talk about 'this/the area'. This area comprises the specific case study about which you will answer the questions, in your case this is [......... As each partner has very different case study/case studies, we ask you to fill this in for your specific case. Each partner will know best what the correct and clearest description for their case study is.] Also, we refer to 'your business', which is the business you own or where you work.

Please pay attention: questions refer to the general situation in this area, as it was **before** the corona pandemic this year (2020), unless stated otherwise.

<u>General questions about your business</u>

1. Where is your business located? Please specify the postcode.
   _____

2. What is the type of the business?
   0   Visitor attraction, site or activity provider (go to question 3)
   0   Accommodation (go to question 12)
   0   Restaurant/café/bar (go to question 16)
   0   Other, namely _____ (go to question 3)

3. How can your business best be described?
   0   Museum
   0   Visitor center
   0   Cultural heritage site
   0   Natural site
   0   Art gallery
   0   Religious site

0	Theme park
0	Farm/vineyard
0	Historical site
0	Entertainment site (e.g. film house or theatre)
0	Library
0	Other, namely _____

4. What are your admission fees per individual adult visitor (full-price ticket)?
   _____ €

5. In case your business offers food, beverages/souvenirs etc., what is the estimated revenue per visitor?
   _____ €

6. What is the number of visitors your business receives each year on average?
   _____ visitors

7. What is the total visitors' capacity of your business per year?
   _____ visitors

8. What is the average time visitors spend in your business?
   _____ hours

9. What is the size of the site in square meters?
   _____ m^2

10. What is the size of the site's open area (gardens, parks) in square meters?
    _____ m^2

11. What type of visitors are targeted? Please order the following options from 1 to 5 (1 being the most important and 4 the least). Please go to question 16.
    ____ Children
    ____ Families
    ____ Adults
    ____ Other, namely _____

12. How can your accommodation best be described? (Answer questions 12 to 15 only when you stated your business was an 'accommodation' in question 2.)

0	Hotel 4/5*
0	Hotel 2/3*
0	Hotel 1*/Guesthouse/B&B
0	Hostel
0	Farm accommodation
0	Camping
0	AirBnB
0	Mountain lodge
0	Other, namely _____

13. What is the total number of beds in your accommodation?
    - 0   ≤10
    - 0   11-20
    - 0   21-50
    - 0   51-100
    - 0   101-200
    - 0   ≥ 201

14. What is the estimated occupancy rate at different seasons of the year? Please choose one option for each season.

	Closed	≤40%	41-69%	≥70%
Spring	O	O	O	O
Summer	O	O	O	O
Autumn	O	O	O	O
Winter	O	O	O	O

15. What is the average length of stay of your guests?
    - 0   1 night
    - 0   2-4 nights
    - 0   5-7 nights
    - 0   8 nights or more

16. How can the ownership of your business best be described?
    - 0   Family business
    - 0   Private business
    - 0   Part of a national chain
    - 0   Part of an international chain
    - 0   Public sector
    - 0   Other, namely _____

17. In what year was your business founded?

    _____

18. How many FTEs (Fulltime-Equivalents) work in your business (including family members) during the different seasons in a normal year (so this year excluded)?

Season	Number of FTEs
Spring	
Summer	
Autumn	
Winter	

19. What are the busiest times for your business? You can choose multiple options.
    - 0   Spring
    - 0   Summer
    - 0   Autumn
    - 0   Winter
    - 0   Christmas
    - 0   School holidays

20. Where do your visitors come from? And what are your most important target groups when promoting your business? Please order for both questions the following options from 1 to 5 (1 being the most important and 5 the least).

	Origin of visitors	Target groups
Domestic tourists (within 150 km)	___	___
Domestic tourists (more than 150 km)	___	___
International tourists from neighboring countries	___	___
International tourists from the EU	___	___
International tourists from outside the EU	___	___

21. What is your approximate share of income from domestic and foreign tourism? Please choose one option from each row.

Domestic tourism	0%	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%
Foreign tourism	0%	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%

22. How do you promote your business? You can choose multiple options.
- 0 Website
- 0 Social media
- 0 TripAdvisor
- 0 Travel agent/tourist information center
- 0 Online travel agent (e.g. booking.com)
- 0 Printed media
- 0 Word of mouth
- 0 Links from partner websites
- 0 Other(s), namely _____

23. What kind of trend do you identify in the performance of your business over the last five years (the year 2020 excluded)?

Downward trend   1   2   3   4   5   Upward trend

24. How do you feel about the number of tourists that visits your business each year?

Too few tourists   1   2   3   4   5   Too many tourists

Questions about (cultural) tourism

25. What cultural themes your business offers? Please indicate for each of the following themes whether your business offers it, and choose which one is the most important.

Theme	Your business	Most important (max 1)
Religion	Yes / No	O
Music	Yes / No	O
Dance	Yes / No	O
Theatre	Yes / No	O
Artwork	Yes / No	O
History	Yes / No	O
Folklore/local traditions (including festivals)	Yes / No	O
Archaeology	Yes / No	O
Heritage	Yes / No	O
Architecture/townscapes	Yes / No	O
Literature	Yes / No	O
Film	Yes / No	O
Gastronomy/wine	Yes / No	O
Other, namely _____	Yes / No	O
Other, namely _____	Yes / No	O

26. What cultural themes would you like to see more developed in your business, or in this area?

Theme	Your business	This area
Religion	Yes / No	Yes / No
Music	Yes / No	Yes / No
Dance	Yes / No	Yes / No
Theatre	Yes / No	Yes / No
Artwork	Yes / No	Yes / No
History	Yes / No	Yes / No
Folklore/local traditions (including festivals)	Yes / No	Yes / No
Archaeology	Yes / No	Yes / No
Heritage	Yes / No	Yes / No
Architecture/townscapes	Yes / No	Yes / No
Literature	Yes / No	Yes / No
Film	Yes / No	Yes / No
Gastronomy/wine	Yes / No	Yes / No
Other, namely _____	Yes / No	Yes / No
Other, namely _____	Yes / No	Yes / No

27. Please indicate your agreement with any of the following statements regarding cultural tourism in your area, on a scale from 1 (disagree strongly) to 5 (agree strongly).

Cultural tourism is well developed in this area.	1	2	3	4	5	not applicable
It is important that cultural tourism is present in this area.	1	2	3	4	5	not applicable
This area has a lot of potential for cultural tourism, i.e. it has a strong cultural appeal.	1	2	3	4	5	not applicable
Government should help businesses with developing and increasing cultural tourism in this area.	1	2	3	4	5	not applicable
Government should invest in the development of cultural tourism in this area.	1	2	3	4	5	not applicable
Tourist numbers should be higher in this area.	1	2	3	4	5	not applicable
Tourist flows should be better regulated in this area.	1	2	3	4	5	not applicable
There are enough cultural attractions/site/events in this area.	1	2	3	4	5	not applicable
There is a good diversity of cultural attractions/site/events in this area.	1	2	3	4	5	not applicable
There are still locations/traditions in this area that have the potential to become a cultural attraction/site/event.	1	2	3	4	5	not applicable

28. We would like to know what type of tourism your business receives. How likely is your business to receive the following type of tourists on a scale of 1 (very unlikely) to 5 (very likely)?

Mass tourism/large groups/package groups	1	2	3	4	5	not applicable
Special-interest tourism	1	2	3	4	5	not applicable
Outdoor/adventure searching	1	2	3	4	5	not applicable
Eco-tourism	1	2	3	4	5	not applicable
Families	1	2	3	4	5	not applicable
Couples/travelling alone	1	2	3	4	5	not applicable
Business/work-related groups	1	2	3	4	5	not applicable
Other (if applicable):_____	1	2	3	4	5	not applicable
Other (if applicable):_____	1	2	3	4	5	not applicable

29. Please state your agreement with any of the following statements regarding
the visitors of your business, on a scale from 1 (disagree strongly) to 5 (agree strongly).

My visitors are willing to spend a bit extra in order to support the local economy.	1	2	3	4	5	not applicable
It is important for my visitors to get a taste of the local culture and traditions in this area.	1	2	3	4	5	not applicable
My visitors generally spend a considerable part of their time in this area visiting cultural attractions/site/events.	1	2	3	4	5	not applicable
My visitors visit this area specifically because of the cultural appeal of this area.	1	2	3	4	5	not applicable
My visitors ask me for recommendations on cultural attractions/site/events in this area.	1	2	3	4	5	not applicable

30. What aspects do you think could provide most economic improvement in your area? Please choose the 3 aspects you consider most likely and number them from 1 to 3, with 1 being the most likely candidate for improvement.
    ____ Infrastructure (such as improvements in road network)
    ____ Public transport (such as improvement in bus network)
    ____ Publicity/marketing
    ____ Events
    ____ Attractions
    ____ Gastronomy (such as more and/or better restaurants)
    ____ Information provision to tourist
    ____ Other, namely _____

31. Does your business cooperate with other tourist businesses in this area in any of the following ways? You can choose multiple options.
    0   Cultural itineraries and routes
    0   Marketing strategies
    0   Buffering tourist flows
    0   Lobbying at public authorities
    0   Joint purchases
    0   Joint activities
    0   No cooperation
    0   Other(s), namely _____
             _____

32. Please indicate your agreement with any of the following statements regarding cooperation between your business, or tourist businesses in general, and the cultural sector, on a scale from 1 (disagree strongly) to 5 (agree strongly).

There is cooperation between my business and the cultural sector.	1	2	3	4	5	not applicable
I see potential in more cooperation between my business and the cultural sector.	1	2	3	4	5	not applicable
There is cooperation between tourists businesses in this area and the cultural sector.	1	2	3	4	5	not applicable
I see potential in more cooperation between tourist businesses in this area and the cultural sector.	1	2	3	4	5	not applicable

33. What could be improved in the area – and by whom – in order to improve the experience both for tourists and for your business?
    [open question]

Questions about the Corona virus

The following questions (34 to 40) concern the current coronavirus pandemic situation (starting in most countries in February/March 2020).

34. Has your business been affected by the corona virus?
    0   Yes, go to question 35.
    0   No, thank you for filling this questionnaire, you do not have to answer the last questions.

35. How many FTEs (Fulltime-Equivalents) work in your business (including family members) this year?

Season	Number of FTEs
Spring	
Summer	
Autumn	

36. Have you undertaken any of the following measures to offset the negative impact of the pandemic? Please choose one option for each measure.

	Yes	No
Advertising as normal	O	O
Maintain connections with existing customers	O	O
Exploring new markets	O	O
Enhancing existing digital services (e.g. website, social media)	O	O
Developing new digital services (e.g. website, social media, etc.)	O	O
Developing other new initiatives/products	O	O

37. In what ways has your business been affected by the coronavirus outbreak on a scale from 1 (no impact) to 5 (strong impact)?

Reduced international visitor numbers	1	2	3	4	5	not applicable
Reduced national visitor numbers	1	2	3	4	5	not applicable
Cancellations of bookings	1	2	3	4	5	not applicable
Rearrangements/postponement of bookings	1	2	3	4	5	not applicable
Reduced levels of bookings	1	2	3	4	5	not applicable
Cancelled events	1	2	3	4	5	not applicable
Forced closure of your establishment	1	2	3	4	5	not applicable
Other, _____	1	2	3	4	5	not applicable
Other, _____	1	2	3	4	5	not applicable

38. Have you adopted any new measure(s) regarding your employees due to the coronavirus pandemic?

	Yes	No
Kept on the books with zero hours contracts	O	O
Furloughed with pay	O	O
Furloughed with partial pay	O	O
Redirected to other tasks	O	O
Laid off	O	O
Not hired	O	O
Other, _____	O	O

39. What kind(s) of assistance have you received from the government in order to offset any impact caused by the coronavirus pandemic? Please choose one option for each type.

	Yes	No
Financial assistance with furloughs	O	O
Loans	O	O
General advice	O	O
Other, _____	O	O
Other, _____	O	O

40. How long can your business be sustained under the present circumstances? Please choose one option.

0   Less than three months

0   Three months

0   Six months

0   Nine months

0   One year

0   More than one year