

# **AN EXPLORATORY ANALYSIS OF ECOC TOURISM AS A NICHE PRODUCT IN CULTURAL TOURISM**

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## *1. Research background*

The research presented in this paper is part of a 3-year research project (2011-2014) entitled "Creativity and its added value in niche tourism – following and creating trends in Hungary", supported by the Bolyai János Research Scholarship of the Hungarian Academy of Sciences. The principal aim of the project is to analyse the actual and the potential added value of niche tourism products in the successful development and the international competitiveness of Hungarian tourism.

Niche tourism<sup>1</sup> (also known as special interest tourism) is a relatively new phenomenon in the history of tourism and which has emerged during the last two decades, in parallel with the globalisation of mass tourism, as a new, opposite trend based on specialisation instead of homogenisation<sup>2</sup>. The increasing ratio of experienced travellers has produced new demand patterns and has significantly influenced the services offered by many destinations and companies. The importance of alternative tourism products such as festival tourism or ecotourism has been increasing<sup>3</sup>, and the gradual fragmentation of the supply led to the creation of highly specialised niche products, such as "birding" within ecotourism. Although niche tourism products are highly diverse, they all satisfy the unique needs of very narrow segments, particularly in comparison with the mass demand and relatively standardised supply of traditional tourism products (such as waterside holidays, winter holidays/winter sports or general interest urban tourism). Consequently, in niche tourism, the basis of product development is uniqueness and a personal, tailor-made approach, often with the tourist's active involvement in the product design and the service delivery process<sup>4</sup>. Since the major distinguishing factor of niche tourism products is their unique and innovative quality, niche tourism should be considered a destination-specific concept, for various reasons. On the one hand, certain tourism services may satisfy the needs of narrow niche segments in one destination, whilst being in relatively high demand in other places. On the other hand, the natural and cultural

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<sup>1</sup> Novelli (2005)

<sup>2</sup> Hall & Weiler (1992)

<sup>3</sup> Michalkó (2007)

<sup>4</sup> Ritchie & Hudson (2009)

resources of a country also have a major influence on the potential development of new products.

The 3-year research project aims to map the current situation of niche tourism development in Hungary, using both secondary and primary methods to understand the nature and characteristics of the concept in Hungary. Among the main questions of the overview are the transformation and innovation potential of traditional Hungarian tourist products, together with the success factors of niche product development and the Hungarian travelling population's propensity to buy new types of experience. Currently, contrary to West European trends<sup>5</sup>, analysis of the Hungarian population's tourism demand indicates a dominance of VFR (visiting friends and relatives) travel and water-based leisure holidays. Compared to this even alternative tourism products – e.g., health tourism or cultural tourism – seem to enjoy relatively low popularity, whilst the actual demand of niche tourism is practically invisible due to the lack of relevant statistical data<sup>6</sup>.

The research discussed in this paper was inspired by my long interest in tourism development and cultural innovation in European Capitals of Culture<sup>7</sup>. Its aim is to explore, as part of a pilot project, whether visiting ECoC cities is mainly motivated by a broad interest in cultural experiences – and it is the richness of these cities' cultural programme which acts as a pull-factor for visitors – or whether the unique status of being a European Capital of Culture is able to add an attraction beyond the general value of the cultural supply. In other words, may ECoC tourism be considered as a niche segment within cultural tourism?

## 2. *Cities as destinations for cultural tourism*

The major destinations for cultural tourism worldwide are cities<sup>8</sup>, whose milieu and cultural attractions may have a significant influence even on the national tourist image of their countries. In order to satisfy the constantly changing needs of visitors, co-operation is essential between a city's cultural sector and its tourism industry<sup>9</sup>. However, in an optimal case, the quantitative and qualitative development of cultural services and institutions primarily aims to improve the local population's quality of life and to increase the residential attractiveness of a given place. The growth of visitor numbers will be a partly indirect positive impact of such development.

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<sup>5</sup> ETC (2006)

<sup>6</sup> Magyar Turizmus Zrt. (2012)

<sup>7</sup> Rátz (2006ab)

<sup>8</sup> Richards (1998)

<sup>9</sup> Michalkó & Rátz (2005)

Based on a product-oriented approach to tourism, cultural tourism mainly includes travel to cities and towns where the core attraction component consists of tangible heritage resources and cultural events. In the system of cultural tourism, cities and town provide an urban scenery for visitors' cultural experiences, embodied in the physical-geographical space and the built environment. In addition, a cultural destination features key attractions, tourist amenities and a unique milieu, i.e. a distinctive manifestation of the experience components of the tourism space<sup>10</sup>.

Cultural tourism demand is mainly concentrated in historic cities and national capitals<sup>11</sup>, although the recent trend of regenerating industrial areas through culture also led to the development of many former industrial cities as international destinations of contemporary cultural tourism<sup>12</sup>. Although new lists and rankings of cultural destinations are published regularly by a variety of travel magazines and professional organisations, the following cities are generally included on virtually every map of European cultural tourism: Paris, Rome, London, Athens, Venice, Florence, Vienna, Prague, Barcelona, Amsterdam, Dublin, Madrid, Berlin, Budapest and Brussels<sup>13</sup>. Although ranking varies by year and by source, what these cities all have in common, besides their high-level amenities and heritage resources, is a constant reinvention of their cultural attractions, a characteristic atmosphere and a strong cultural destination brand, based on these actors. Several of these cities have also gained ECoC status during the history of the project, further enhancing their cultural destination image<sup>14</sup>.

Nevertheless, culturally motivated travellers' interest in less-known and less-visited cities has been growing significantly during the last decades<sup>15</sup>. Since the majority of ECoC cities after 2000 belong to this category, the changing trends in visitation, together with the additional impact of attraction development and the consequently increasing media attention, have contributed to a growth in cultural tourism demand, as well as local cultural consumption, in these destinations. Although most cities used an event-oriented, purposefully multicultural approach<sup>16</sup>, the development of iconic cultural institutions and the general revitalisation of urban areas were also included in every ECoC programme, and so most capitals of culture experienced significant direct economic benefits and less marked medium-term impacts<sup>17</sup>.

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<sup>10</sup> Michalkó & Rátz (2006)

<sup>11</sup> Smith (2003)

<sup>12</sup> Campbell (2011)

<sup>13</sup> Richards (2001), [www.lonelyplanet.com](http://www.lonelyplanet.com), [www.tripadvisor.com](http://www.tripadvisor.com), [www.cntraveler.com](http://www.cntraveler.com)

<sup>14</sup> Palmer/Rae Associates (2004)

<sup>15</sup> ETC & WTO (2005)

<sup>16</sup> Lähdesmäki (2009)

<sup>17</sup> Filipić, Gluić & Vukorepa (2010)

### 3. *Research methods*

In order to explore the potential of ECoC tourism as a special niche product within the more general cultural tourism experience, a questionnaire survey was carried out by the Tourism Department of the Kodolányi János University of Applied Sciences on a sample of 300 persons in Hungary using multi-stage sampling. At the first stage, in order to be included in the sample, respondents were required to be at least 18 years old, have an above-average cultural consumption level (based on indicators – but extending the concept of cultural consumption – defined in the 2003 survey of the Sociological Research Institute of the Hungarian Academy of Sciences<sup>18</sup>), and at least 50% of the participants were expected to have visited Pécs ECoC 2010 between 2007 and 2012; at the second stage, convenience sampling was used by the interviewers until they reached their personal quota.

In addition to their overall cultural consumption habits, the survey focused on respondents' experiences in and attitudes towards selected ECoC cities, with special attention to the perceived impacts of the ECoC year in the city of Pécs.

Considering their demographic characteristics, 50.7% of respondents were male and 49.3% female. 19.7% considered their income as lower than the Hungarian average, 59.0% as average and 19.7% as higher than average (1.6% did not wish to share this information). While 80.3% visited Pécs within the specified time period, 49.7% did so in 2010, specifically with the motivation to experience the ECoC programme. 43.3% of respondents had a BA/MA degree or higher, and 45.8% had finished secondary school (the above-average education level<sup>19</sup> may be attributed to the similar cultural consumption level which was used as a requirement for participation in the survey).

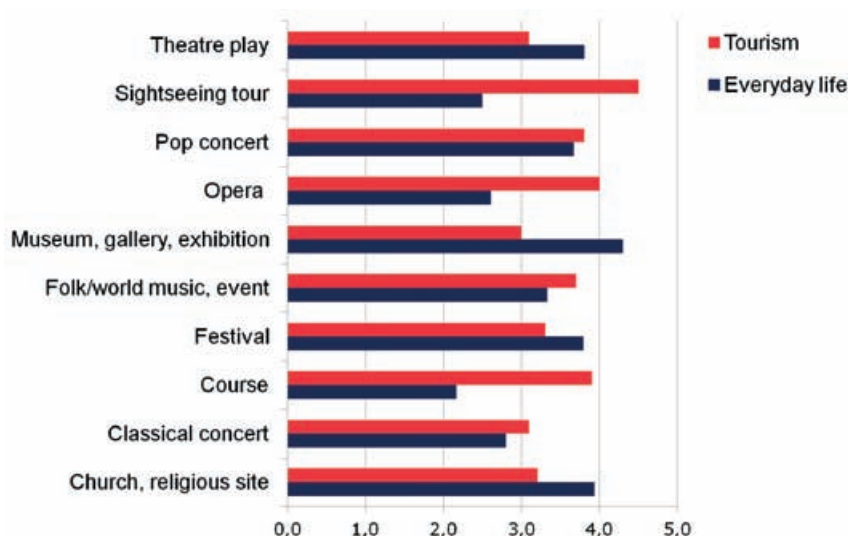
Figure 1 summarises respondents' involvement in cultural activities, both in everyday life and as part of their leisure travel experiences. As the results of the paired-samples T-test indicate, being a tourist significantly increases respondents' willingness to join sightseeing tours, to participate in courses and to watch opera performances. Theatrical performances and museum visits are predominantly leisure activities, as is visiting churches and other religious sites. (In the latter case, of course, everyday consumption may be more closely associated with practising one's religion, whilst tourism consumption is probably related to visiting historic monuments and sites of religious significance).

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<sup>18</sup> Dudás & Hunyadi (2005)

<sup>19</sup> Medgyesi (2009)

Figure 1 – Characteristics of respondents' cultural consumption\*,\*\*



\*Tourism: 1=never, 2=rarely, 3=occasionally, 4=often, 5=always

\*\*Everyday life: 1=never, 2=every few years, 3=1-2 times/year, 4=3-4 times/year, 5=once a month

Culture generally plays a significant role in respondents' leisure travel consumption: on a 1-5 Likert scale (with 1=absolutely unimportant and 5=absolutely important), survey participants on average attributed a value of 4.0 to cultural experiences. However, the significance of cultural attractions seems to be embodied by complex destinations (historic centres, architectural complexes) as opposed to specific events: in order to visit a destination famous for its cultural-historic heritage and sights, respondents were willing to travel 711 km on average, while cultural events would only motivate them to travel 326 km. This attitude is partly reflected in the list of culturally important Hungarian destinations selected by the respondents as places worth to visit. Budapest received 23.6% of all the votes, followed by Pécs (19.5%), Szeged (12.6%), Debrecen (11.5%) and Sopron (5.2%). Budapest, the capital, offers a concentration of heritage resources and contemporary cultural institutions and has been the centre of the country's cultural and urban tourism for decades. In the case of Pécs, the increased media attention before, throughout and immediately after the ECoC 2010 year certainly contributed to the city's favourable ranking in the survey of participants' perceptions. (However, of the above five highly recommended cultural centres, only Budapest and Sopron are listed

among the most visited Hungarian cities in 2011, illustrating Hungarian domestic travellers' preference for spa destinations)<sup>20</sup>.

#### 4. *Respondents' interest in ECoC cities*

In the survey, participants were asked to list those three European cities which they would most like to visit in 2013. Of the 826 responses, in harmony with the list of popular European urban destinations mentioned above, Paris ranked first (mentioned by 19.6% of the sample), followed by London (17.3%), Rome (10.1%), Prague (6.5%) and Barcelona (6.0). The top five cities accounted for 59.5% of all the answers. However, neither Marseille nor Košice (ECoCs 2013) were mentioned at all, despite the relatively active promotional efforts of the latter among the Hungarian population.

In order to explore whether ECoC status has a special attraction among people who are generally active cultural consumers and consider cultural experiences influential in their travel decisions, respondents were provided with a list of selected ECoC cities. and were asked to indicate whether they visited the place at least once for any reason between 2007-2012, whether they travelled to the given city during its ECoC year with the specific motivation to enjoy the ECoC programmes and atmosphere, or if they were planning to visit the destinations in the near future. In addition, they were also asked to describe those characteristics and ideas that they most strongly associated with these cities (Table 1). ECoCs were selected from the period 2007-2013, taking into consideration their geographical and cultural distance and the characteristics of Hungarian tourist demand to the given countries (e.g. Istanbul 2010 was not included since Hungarian outgoing tourism to Turkey is predominantly seaside-oriented, Sibiu 2007 was included due to its location in Transylvania and its multicultural Hungarian-Saxon-Romanian heritage).

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<sup>20</sup> Magyar Turizmus Zrt. (2012)

Table 1 – Interest in the ECoC cities (2007-2013)

<b><i>Visited (2007-12)*</i></b>	<b><i>Visited in ECoC year**</i></b>	<b><i>Plan for (2012-13)</i></b>	<b><i>Main associations</i></b>
<b><i>Sibiu (ECoC 2007)</i></b>			
8.3%	0.0%	14.7%	Transylvania German & Hungarian culture Education Common heritage
<b><i>Linz (ECoC 2009)</i></b>			
24.3%	26.7%	25.7%	Danube Welcoming city Orderly, clean Linzer (cake) Museums
<b><i>Essen (ECoC 2010)</i></b>			
1.7%	0.0%	18.0%	Ruhr region Beer Industrial <b>ECoC</b> German culture

Table 1 cont. – Interest in the ECoC cities (2007-2013)

<b><i>Visited (2007-12)*</i></b>	<b><i>Visited in ECoC year**</i></b>	<b><i>Planning to (2012-13)</i></b>	<b><i>Main associations</i></b>
<b><i>Pécs (ECoC 2010)</i></b>			
80.3%	59.3%	67.7%	<b><i>ECoC</i></b> Zsolnay ceramics, factory Turkish heritage University Basilica Colourful
<b><i>Tallinn (ECoC 2011)</i></b>			
3.3%	1.7%	9.3%	Nothing at all Baltic state Cold Fortress Russian/Soviet
<b><i>Turku (ECoC 2011)</i></b>			
0.0%	0.0%	8.7%	Nothing at all Cold Relatives Sauna Probably Turkish/Asian
<b><i>Guimarães (ECoC 2012)</i></b>			
0.0%	0.0%	6.7%	Nothing at all Unknown Exotic Mediterranean



Table 1 cont. – Interest in the ECoC cities (2007-2013)

<b><i>Visited (2007-12)*</i></b>	<b><i>Visited in ECoC year**</i></b>	<b><i>Planning to (2012-13)</i></b>	<b><i>Main associations</i></b>
<b><i>Maribor (ECoC 2012)</i></b>			
14.8%	33.3%	19.7%	River Drava Sea Slovenian culture Wine-tasting Sports
<b><i>Košice (ECoC 2013)</i></b>			
8.2%	N/A	22.9%	Cathedral World War 2 Beer Common heritage Ferenc Rákóczi Close to Hungary

\* % of all respondents

\*\* % of those who visited the city between 2007-2012

As Table 1 shows, Pécs, not surprisingly, proved to be the most visited ECoC both in the 2007-2012 period and during the ECoC year. Pécs's favourable position is explained by its unique situation and its recent status as the only Hungarian ECoC in the project's history, its (cultural) significance in Hungarian domestic tourism, as well as the survey sampling method. Linz (Austria) and Maribor (Slovenia) followed Pécs: both countries are among the traditional target areas of outgoing Hungarian travellers, and both cities are located within the roughly 700 km distance which respondents specified as the limit of a culturally motivated trip. (It should be noted that both cities may be included in the itinerary of winter sports enthusiasts also). Comparing the two cities, a higher percentage of respondents visited Maribor during the 2012 ECoC year than Linz during 2009, which, to a certain extent, may be attributed to the increased awareness of the ECoC project following Pécs 2010.

The associations reflect a low level of awareness of the selected cities' ECoC status: the concept is only mentioned in the case of Pécs and Essen (a city which shared the 2010 ECoC year with Pécs, and the selection and programmes of which were covered, to a certain extent, by the Hungarian media). However, Essen's perceived image is strongly

affected by its industrial heritage and its “Germanness”, as implied by the associated stereotype of beer.

Even though the research methods do not allow for broad generalisation, the findings of this pilot study seem to suggest that, in general, the ECoC status of a city by itself offers little attraction for even relatively highly educated, active cultural consumers who acknowledge the importance of culture in their tourism experience. This seems to be particularly true in the case of less traditional and practically unknown cultural destinations: the (lack of) popularity of Tallinn, Turku or Guimarães in the Hungarian market was not affected by their ECoC programmes. Hungary, likewise, was not listed among the major target markets of either of these cities (as opposed to neighbouring Košice, for example, where the ECoC 2013 programme includes specific elements based on the city’s Hungarian heritage). It is also obvious that the survey participants were not sufficiently motivated by the overall European Capital of Culture concept to follow the subsequent years’ programmes after 2010.

When analysing respondents’ willingness to visit a city in the near future, the “common heritage” factor also seems to play a limited role. Distance, the perceived overall image of the destination, timing and the marketing efforts of the given city also had an impact. Even though both Sibiu and Košice are perceived to have a connection to a Hungarian heritage, the totality of the former variables act as a stronger pull-factor for the Slovakian city (which also appears to have run a more focused marketing campaign among potential Hungarian visitors).

Table 2 summarises the perceived overall attraction of the ECoC cities among respondents. The data seem to reinforce conclusions drawn from the analysis of visitation characteristics and associations, in that, although the survey participants generally believe in the cultural richness of the ECoC cities cultural offer, in general they have no stated preference for visiting ECoC destinations. However, the results of the Chi-square analysis suggest that those who visited Pécs in 2010 with the specific objective of enjoying the ECoC experience are more likely to choose former or current ECoC cities as their next destination (Chi-square=10.472, sig.=0.03). (The analysis did not prove any statistical relationship between the rest of the statements included in Table 2 and the respondents’ visit to Pécs in 2010).

Table 2 – The overall attraction of ECoC cities\*

<b>Statement</b>	<b>Mean</b>	<b>St. dev.</b>
Being ECoC significantly increases a city's attraction for me	3.4	1.3
I prefer to visit (former or current) ECoCs	2.7	1.3
The ECoC cities are likely to have a rich cultural product	3.7	1.0
The ECoC cities offer creative, exciting cultural programmes also in the long run	3.5	1.2
To visit a current ECoC is a special experience for me	3.6	1.2

\*On a 1-5 scale with 1=totally disagree, 5=totally agree

Table 3 – Impacts of being ECoC on Pécs\*

<b>Pécs....</b>	<b>Mean</b>	<b>St. dev.</b>
Has become a better place	3.8	1.0
Has become a more creative city	3.7	1.0
Has become a more exciting city	3.6	0.9
Has become a more international city	3.8	1.0
Has become a more visited city	4.0	0.9
Has become a more colourful city	3.8	0.9

\*On a 1-5 scale with 1=totally disagree, 5=totally agree

As Table 3 indicates, there seemed to be a general agreement among the participants that the impacts of the ECoC year on the city of Pécs were mainly favourable. The extent of the perceived changes was relatively modest (only the increase in visitor numbers reached a mean value of 4.0 on a 1-5 scale). Slightly surprisingly, no statistical relationship was shown between one's visit to Pécs in 2010 and the mean values of perceived changes. However, in the light of the rather negative media campaign surrounding the Pécs 2010 ECoC project, the acknowledgment of positive changes may be considered a major achievement in itself.

## 5. *Conclusions*

As the survey results show, cultural consumption plays a generally important role in respondents' life, both in an everyday, leisure context and in their travel experiences. However, their involvement in cultural tourism seems to take place within a relatively traditional framework where classical sightseeing and visiting built heritage attractions dominate the experience, and the range of preferred destinations is rather limited to established cultural centres with strong, historic brands, such as Paris, London or Rome. By itself, the ECoC status of a city does not seem to be sufficient to counterbalance its relatively unfamiliar position in the Hungarian market. Although cultural events (especially opera performances, but also concerts) feature among the most frequent tourist activities of the respondents, and most ECoC cities offer an exciting variety of both classic and contemporary cultural events, several of the recent ECoC cities seemed to be so invisible on the average respondent's mental map that they did not even reach the information search phase of the destination choice process with respect to these cities. To a certain extent, this attitude and behaviour might be explained by social and economic factors: although the participants of this survey travel more frequently for leisure and cultural purposes than the average Hungarian, even their travel habits are affected by the generally low level of propensity to travel and the lack of travel experience of the Hungarian population.

Altogether, the research findings suggest that visiting ECoC cities is mainly motivated by a broad interest in cultural experiences, especially by the given city's cultural-historic image and the strength of its brand in the European cultural tourism market. The main factors which affect visits to ECoC cities are not different from the variables influencing travel decisions and destination choice in general: accessibility, distance, cultural (and natural) resources, image, familiarity with the country, characteristics of tourist services, etc. Consequently, an ECoC city does not seem to become significantly more attractive for the survey participants as a result of the ECoC year, although the original-pull effect of its milieu and attractions may be increased by ECoC events (as happened in the case of Pécs in 2010). Hence, the status of being a European Capital of Culture is only able to create additional attraction beyond the general appeal of the city's cultural product in the case of those destinations which are already rather well established in the Hungarian market. This pilot survey was, therefore, unable to verify the existence of ECoC tourism as a niche product, although, since niche tourism's potential relies in its ability to satisfy the needs of very narrow customer segments, further research could be done using more refined sampling techniques to explore multi-layered characteristics of culturally-motivated tourists.

From a destination-marketing point of view, the research reinforced the importance of long-and medium-term strategies in image building and brand development: the timeframe of the ECoC programme, even if attempts are made to extend it beyond the actual calendar year, is relatively short to attract the attention and change the image perceptions of many potential visitors. However, if adequately planned, the (re-)construction of cultural institutions and the regeneration of the urban environment as part of most ECoC projects will contribute, both directly and indirectly, to increasing an ECoC city's brand value in the long-term, bringing about a positive impact in visitor numbers also.

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