

The Role of Cultural Institutions and Events in the Marketing of Cities and Regions

Edited by
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Approach to cultural tourism in Bilbao and its surroundings. What is the future for marketing strategies?

Introduction

In recent decades, tourism has experienced steady growth and development. By its own specifics, it is subject to changes that take place in the market and in society in general. According to the UNTWO (2014) data, in 2014 there were 1135 international tourist arrivals worldwide, which generated 1,245 billion US\$ international tourism receipts. Furthermore, this data usually grows from one year to the other, so we should predict higher number of tourists and receipts for the near future. Therefore tourism is an activity that is becoming increasingly important. We can identify some drivers related to tourism, such as urbanisation of life and the democratisation of free time, the raising of the Internet and social networks. These drivers are linked with a new kind of consumer, who could be called a citysumer. When analysing citysumer's tourism profile, we get close to urban tourism, with a high component of cultural tourism, or even creative tourism. In other words, a citysumer is a culture and urban-life enthusiast (independently of the destination) and an active participant of the travelling experience (Fernández-Villarán et al. 2011).

Therefore, the destinations must constantly develop, adapt to new demands of their own target audience and offer new products and tourist experiences. This idea is very closely connected with the idea of destinations being turned into "places for consumption" (Urry, 1995, cited in Gonzalez, 2011, 1397).

Urban regeneration models have encouraged cities to be re-created (or re-configured) for habitants, as well as for tourists. Urban regeneration therefore is related to

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the revival of cities and, in many cases, to the overall change of the economic system of the city. This is the case of Bilbao, an industrial city in crisis that went to be known after the 1997, with the inauguration of the second Guggenheim Museum in Europe. This museum was seen as an icon for urban transformation of Bilbao (Gonzalez, 2011), and in urbanism, it has been defined (Gonzalez, 2011) as “the transformation of a city by a new museum or cultural facility into a vibrant and attractive place for residents, visitors and inward investment (Lord, 2007, p.23, cited in Gonzalez, 2011, 1398).

Urbanization is one of the mega-trends of the 21st century. Different studies (Dobbs, 2011; Visualeconomics, 2011 & Intuit, 2010) show the growth of population that cities are experiencing. Urbanization is the melting pot in which “citysumers” appear. Citysumers are defined by Trendwatching (2011) as experienced and sophisticated urbanites. Basic markers of culture tourism are arguably the major cultural attractions. Sites such as the Louvre in Paris, the British Museum in London and the Metropolitan Museum in New York, attract millions of visitors to their displays of culture (from Richards, 2001).

This chapter aims to make a diagnosis of the current situation of cultural tourism in the territory of Bilbao-Biscay and to increase the number of future actions having analysed the context of tourism in the territory. For that purpose, we conducted literature review and analysed current theories of cultural and creative tourism. This work will also look at the Tourism Area Life Cycle (TALC) model (Butler, 1980) to demonstrate that tourism sector in the area needs to be redirected. Theoretical analysis allowed to identify theories that help explain the reality of tourism in the territory and the directions that the tourism companies and public institutions should take in the future.

1. Context of the Study: Tourism in Bilbao

This study is focused on the analysis of the metropolitan area of Bilbao. This is an area, in which tourism has brought a change in the local economy, which suffered from crisis of the industrial sector. In this territory, and mainly in the city of Bilbao, cultural tourism has developed an offer with the worldwide known Guggenheim museum, built in 1997, as its main point.

The construction of the museum was the turning point for tourism in the city, as we can see it in the graph below (Illustration1). The number of tourist arrivals increased from 830,127 in 1992, to 2,550,614 in 2014 (OTE-EBT, Observatorio turístico de Euskadi, Euskadiko behatoki turistikoa, 2015). The clear turning point was 1997, which proves the importance of the Guggenheim Museum for the development of tourism in Bilbao. Since then, the increase seems to be consistent every year, and every summer there are new records of tourist arrivals. Thus, it is not strange that tourist sector is the main source of foreign income (Sánchez-Silva, 2014).

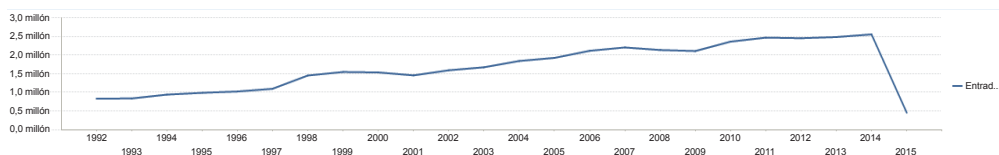


Illustration 1. Tourist arrivals to Bilbao
(OTE-EBT, Observatorio turístico de Euskadi, Euskadiko behatoki turistikoa, 2015).

Within local tourism policy, the 2020 Strategic Tourism Plan (Gobierno Vasco, 2014) is committed to tourist industry, giving special priority to cultural tourism and culinary tourism. The Strategic Tourism Plan aims to “give this industry more economic weight” in the Basque Country and to continue working for Euskadi, in order to be “a landmark destination for 1,600 million people will move in 2020, according to the World Tourism Organization”. The Basque president, Iñigo Urkullu, said that “the culture of tourism has been imposed in Euskadi” (Diario Vasco, 2014). Following the same direction, Itziar Epalza (Deputy Minister for Trade and Tourism, Economic Development and Competitiveness) states that the need to maintain the territory as “an authentic and differentiated destination” (03.12. 2014) — moving away from globalised tourist products, that, as a consequence, leads to mass tourism — which offers differentiated products.

All the declarations made by politicians clearly show the weight of culture and culture related resources and products in the territory. Data gathered from Bilbao-Bizkay Observatory (2014) also demonstrate that tourism in Bizkay is mainly culture related tourism (92% of visitors) (see illustration 2). However, it is necessary to say that culture is not often the main motivation of tourists, and sometimes culture appears to come up “accidentally” as something that tourists do consume without having it previously in mind.

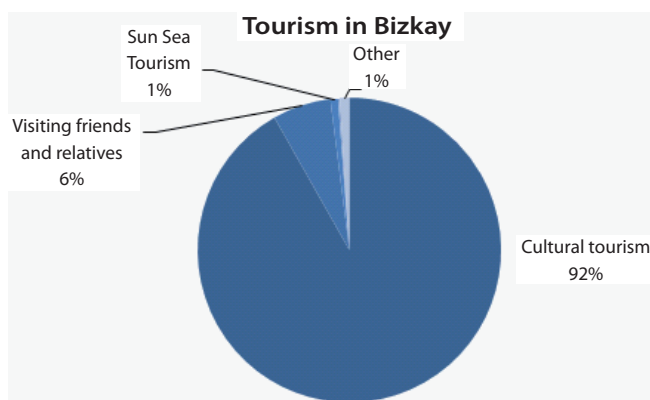


Illustration 2. Tourism in Bizkay (Bilbao-Bizkay Observatory, 2014).

In the case of the metropolitan area of Bilbao, the same happens. Statistics show culture as the main motivation for tourists. As it is shown in the data obtained from the tourism observatory (Bilbao-Bizkay Observatory, 2014), cultural tourism was the motivation for 86.6% of visitors in 2013, visiting friends and family ranked second with the total of 9.2% of respondents. Visitors usually travel with friends (34.9%), with the family (27.6%) or with partners (26.3%).

Data shows that almost a half of tourists stay in Bilbao and concentrate their visiting activities on places located in the city (48.6%) and go to “Museo Guggenheim Bilbao”, “Paseo Ciudad Centro”, “Casco Viejo”, “Museo Bellas Artes of Bilbao”, while the second half visit also other places in the province of Biscay (50.2%), focused on the areas of Uribe Kosta and Busturialdea, such as Getxo, Bakio, Sopelana, Plentzia, Bermeo, Mundaka, Gernika. The remaining 1.2% are also interested in some other tourist places in or out of the province, and decide to visit places near by the province of Biscay. However, when talking about culture and cultural tourism it seems unclear whether the products that are not mentioned by visi-

tors as “visited places” have the potential to be places that will be visited, and consequently, successful resources and products for tourism in the near future.

The products and places that tourists consume and are engaged with, respond to the model, in which Bilbao was re-developed, as it is centred around visiting the Guggenheim Museum, the nucleus and the icon, which attracts the biggest numbers of tourists. However, a deeper analysis of tourist motivations in Bilbao metropolitan area shows that tourists perform different type of activities that are close to the museum too. Therefore, tourists in Bilbao-Biskay could be classified as “Citysumers”, that is to say, city consumers, who are involved in most of the activities offered by the city. They are loyal tourists, as visitors usually come back to the destination, at least 3 times.

Taking the just mentioned characteristics into account, the following chapters will try to delineate directions that will help understand the current tourism model in the area of Bilbao.

2. Cultural tourism and creative tourism

When thinking about motivations that drive tourists flows, it seems clear that culture has been one of them for a long time. Researchers do state that culture has always been a major reason behind travelling, being the main reason for why the Grand Tour developed during the 16th century (Towner, 1985, from Richards, 2001). Therefore, it is possible to say that throughout history culture has been the reason why people would move from one place to another. Currently, culture and mobility and/or tourism could also be easily linked, and, furthermore, culture could nowadays be considered one of the driving forces in tourism development. This responds to the idea of the “Consumption of places”, in which the main products are related to culture, as well as to the construction of places as “places to be consumed” (Bærenholdt, Haldrup, Larsen, Urry, 2004), that usually focuses on a cultural element or product.

Culture is gaining in weight on the agendas of cities and is becoming one of the driving forces behind their development. Sacco (2011) considers that there have been changes in the cultural models and identifies three phases: the phase called Culture 1.0, where culture was not an economic sector itself and was not accessible to most people; Culture 2.0 phase, where cultural and creative activities produce economic value, benefits, and represent an important sector of urban economy; and the third and last phase, called Culture 3.0., conditioned by two main changes in the context, the digital connectivity and digital content production.

Richards (2000) and Richards & Raymond (2000) identified what they called “creative tourism” as a reaction against the traditional cultural tourism, in which learning is the distinguishing feature. According to these authors, creative tourists seek greater interaction with the environment and want to have memorable experiences, that is to say, to enrich their personal development and identity formation. Richards and Raymond (2000: 18) defined creative tourism as “[t]ourism which offers visitors the opportunity to develop their creative potential through active participation in courses and learning experiences which are characteristic of the holiday destination where they are undertaken”. This way, “creative tourism” is considered a new generation of tourism, which comes after the first generation “beach tourism” and second generation “cultural tourism” (UNESCO, 2006).

In 2006, UNESCO adopted the “Creative Cities Network” concept whose definition matches the Creative Tourism “tourism where the visitor has, emotional, social and participatory educational interaction with the place, its culture and the autochthonous

people. Tourists feel as citizens at these destinations". In sum, it aims to develop participatory, memorable and creative unique experiences, based on experiential and creative collaboration between tourists and locals at the destinations. The following illustration (illustration 3) summarises the models of the creative tourism, taking into account both creativity as an activity and creativity as a background, taking into account the experiences and products offered but also the way, in which people involve or engage with the activity and the background, territory and people in such a territory.

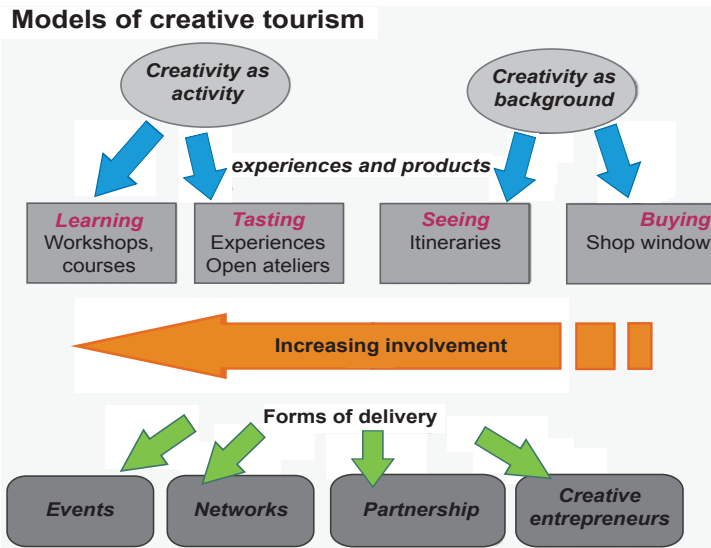


Illustration 3. Models of creative tourism
(Richards, 2011, from Richards and Marques, 2012).

Most authors agree in emphasizing creativity as one of the most important aspects for the development and transformation of cities; the importance of developing innovative and creative processes and strategies of renewal and strengthening of the tourism sector and the refining and development of products, services and tourist destinations in the future.

The term "orange tourism" emerged in relation to creativity, (based on Tresserras, 2015), which will be explained in the next section of the present chapter. "Orange tourism" refers to sustainable tourism and tourism generating cultural, economic and social development through responsible tourism management of cultural heritage, artistic production and cultural and creative industries.

3. Analysis of the demand for cultural tourism: the citysumer

There are several studies showing that mobility is a "central component of European ways of life", (Guereño-Omil et. al, 2014: p. 547) mainly after the abolishing of the European borders. In that sense, the reasons or motivations behind such mobility have changed too. As Vargas explains (2008, in Fernández-Villarán et al. 2014), tourists are

increasingly demanding and require a range of products that complement the traditional model of sun and beach tourism. In this sense, one of the most interesting trends is the growth of the so-called “niche tourism”. It has been developed as opposed to mass tourism, and it represents a new way, in which tourist agents design their offer and, in turn, a new way of, in which tourists experience the destination.

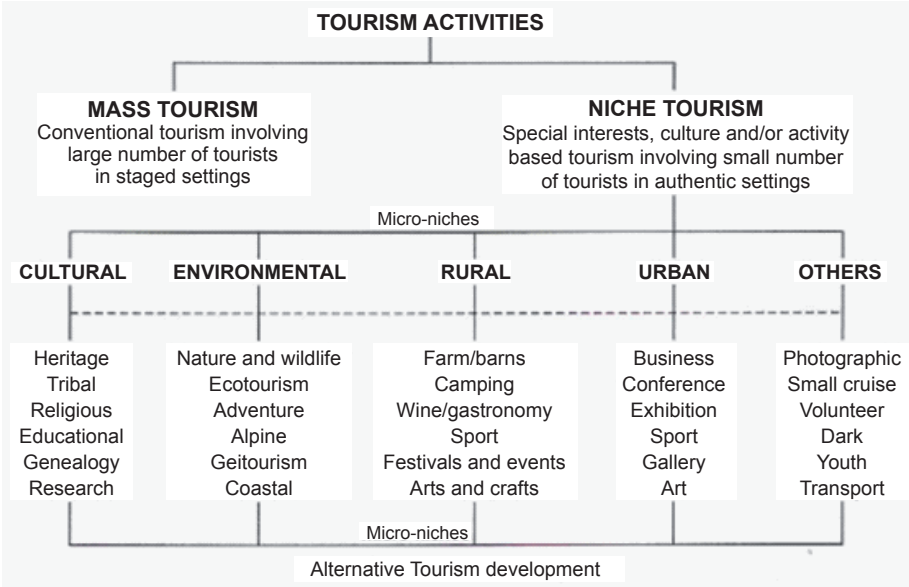


Illustration 4. Niche Tourism Components (Novelli, 2013).

As shown in Illustration 4, the niche tourism consists of tourist products designed for very specific types of tourists, traveling individually or in small groups, interested in learning and experiencing in more authentic settings and in a more sustainable way (Novelli, 2013). Both cultural tourism and creative tourism fit perfectly into this definition.

The citysumers, that we have mentioned before, also fit with the alternative tourism development stated by Novelli (2013), since citysumer will consume many activities in the city. The citysumer has emerged thanks to the urbanization process and thanks to new technologies. Understood as a special type of urbanites, Haynes (2011) reviews the features of citysumers and talks about urbanites who, regarding different variables, are described as (1) people with some level of disposable income and urban origin, in terms of their sociodemographic profile, with (2) consumer patters that are eagerly snapping up a whole range of new urban goods, services, experiences, campaigns and conversations. They are embracing products, services and experiences that are more daring; (3) high-technology users, as they are time-starved, choice-rich; smart phone clutching. They are people connected to the Internet, spontaneous, experimental, individual and are calling for a new generation of services, experiences, campaigns and talks with its love marks, besides having a high or very high financial and cultural level (Science of the time, 2010; trendwatching.com, 2011), and finally (4) and according to their psychographic profile, they are more mature, or just more relevant to urban culture, savvy, wired, super-spontaneous, seriously space-deprived, addicted to the here-and-now experiences. They are ever more demanding and more open-minded; but also more proud, more connected, more spontaneous, and

more try-out-prone. They seek choice and freedom, flexibility and rawness, unrestricted opportunity. They have an “enjoy life” fun lifestyle and are up for brands that challenge, thrill, titillate, or even shock, ever increasing amounts of time spent online.

Finally, Haynes (2011) defends that citysumers embrace urban culture and, as a result, their identity is often closely tied to a city’s culture, its brand, its heritage and its “being”. That is to say, they are “urban beings” that — according to the author — enjoy connecting with other real-life human beings, and embrace the choice, the excitement, the frenetic pace, the spontaneity, the chaotic vibrancy offered by urban life.

In terms of the type of tourist experiences that a citysumer seeks, most authors who have written on the subject (Yun, et al, 2007) consider that cultural tourism is a tourism typology differentiated from the rest and characterised by consumption activities and attractions related to the cultural heritage at the destination, both tangible and intangible. However, for citysumers cultural tourism is synonymous with travelling to destinations with different cultures. For them, the simple fact of visiting different cultures is already considered cultural tourism, consuming visits, sounds, tastes and smells of a culture that is unfamiliar. Therefore, citysumers will be more related to creative tourism than to the traditional perspective of cultural tourism.

Van der Ark and Richards (2006, in Fernández-Villarán et al, 2011) have researched cultural tourism behaviour and destination preferences in nineteen European capital cities. These authors defined a latent class model with three classes, which considers the level of participation and attractiveness, by using the level of participation in cultural activities (participation) and the level of enjoyment of those cultural activities (attractiveness). According to them, at the first level there is Class 1, with “low participation and high attractiveness”, with relatively infrequent participation but high enjoyment (which are potentially the most interesting from a marketing point of view); Class 2 with “high participation and high attractiveness”, with high participation and attractiveness, who have the highest cultural capital, and could be considered ‘specific cultural tourists’, and finally; Class 3 with a “high participation and low attractiveness”, who could be considered ‘general cultural tourists’.

Fernández-Villarán et al (2011) analysed the relationship between citysumer in his role as a tourist and a creative tourist. Citysumer tourist, involved in active participation, could be classified both in the second and in the third class, since it belongs to what Florida (2002) defines as a “creative class” or “creative tourists”. The citysumer tourist is no longer satisfied with a place to visit and being a mere spectator. The citysumer seeks to live through experiences, learn and share unique and memorable moments with the inhabitants of a city. Citysumer tourists, as creative tourists, aim to experience the urban destination.

Urban destinations that aim to attract this segment of consumers will have to focus their choice of activities in accordance with the following characteristics: related to any of the components that make up the cultural identity of the destination, creative, participative and boosting the active learning of the tourist. These elements will not consider just the traditional perspective on culture, but culture of any kind and aspect, such as various projects or engaging with local authors, among others (based on Tresserras, 2015).

The model proposed by Tresserras (2015) takes into account both the creative aspect of the activities offered in the destination and the degree of participation of tourists in collaboration with artist, citizens and the destination. The model that he proposes contemplates the aspects of the model proposed by Richards in 2011 (Illustration 3), but defines as “orange tourism” the part of “creativity as activity”, by adding the concepts of exhibiting, creating and contacting, to the previously proposed concepts of learning and tasting.

4. Tourism Area Life Cycle (TALC) model applied to the culture tourism in the area of Bilbao

The urban regeneration models have encouraged the cities to be re-created (or re-configured) for inhabitants, as well as for tourists, as it has been mentioned in the introduction. Effects of urban regeneration affect, and many times are related to, tourism development and policy making processes. In the case of the city of Bilbao, the construction of the Guggenheim museum responded to the necessity of recreating and transforming the city, as it has been previously mentioned, following a completely different economic model. As Gonzalez (2011) stated, the museum was seen as an icon for the urban transformation of Bilbao. Therefore, Bilbao could be seen as a city for tourists, where many activities and places have been built, and are being created. However, it is not clear, which are the directions that tourism development should take in the future.

To identify the current situation in the field of the development of tourism, this research takes into account the Tourism Area Life Cycle (TALC) model. The stages of the life cycle of a product comprise the upswing in demand until reaching its maximum exposure, and then fall into decline. However, the application of this concept to a destination involves certain difficulties as a destination cannot be replaced and the decline phase caused by crisis brings inevitable implications for economic and social character. The first researcher who pointed out the problem of the life cycle of tourist destinations was Plog (1973) but it was back in 1980, when Butler developed his theory resulting in the Tourism Area Life Cycle (TALC) model.

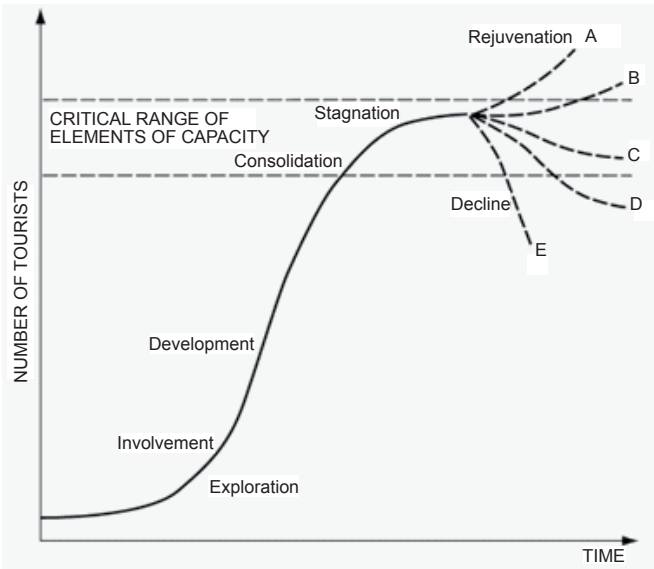


Illustration 5. A tourism area cycle of evolution (Butler, 1980).

Butler identifies six phases and provides a positive relationship between the number of visits and tourism development, so that the evolution of the tourist area is represented by an elongated S shape graph. The model calls for the development of a destination un-

til it reaches a saturation point. As a result, the destination loses its attractiveness and the demand stagnates, leaving its future in an uncertain situation. This model has been one of the most impressive in the conceptualisation of tourist destinations. Recognising the phase of a destination will serve (public and private) planners and managers of a destination to take appropriate action at that time.

According to tourism data, Bilbao — Bizkaia as a tourist destination has revolved primarily around the Guggenheim Museum. However, Bilbao has experienced a much deeper urban and architectural transformation. As noted by García de la Torre (2013) brothers, we can distinguish three distinct periods in the development of the city. Since the city was founded, in 1300–1876, in the longest stage, Bilbao was a commercial city. It became an industrial city between 1876 and 1986. During this stage, the river of Bilbao (Ria de Bilbao) and nearby towns began a profound process of urbanisation, changing from a rural to an industrial landscape (Alonso, 2005 en Rodríguez-Zulaica, 2013). This deep urban and demographic transformation will forever mark the character and identity of the town and its inhabitants. However, in the 1990s, after a deep industrial crisis, Bilbao faced the challenge of maintaining its leadership position, betting on a new economic and social scene. The transformation of Bilbao, from an industrial to a modern and cosmopolitan city of services, has been studied by authors such as Maria Gomez (1998), Arantxa Rodriguez (1998, 2001, 2002) and Jordi Tresserras (2001, 2004) (en Rodríguez-Zulaica, 2013).

This new phase is undertaken mainly through three plans: the land-use planning (Bilbao, 1994); the Strategic Plan for the Revitalization of Metropolitan Bilbao (Bilbao Metropoli 30, 1992); and the Comprehensive Sanitation Plan of the Ria (Consorcio de Aguas, 1979), which together with the Metropolitan Railway project, developed by Norman Foster; the remodelling of Abando Intermodal Station and the building project of the Alhóndiga, enabled Bilbao and its surrounding area to experience a real urban transmutation.

The General Land-use Planning of Bilbao includes the relationship between the degree of development of a city and its position in the cultural field, which envisaged the construction of cultural facilities as the core of the urban regeneration of the city. The Guggenheim Museum becomes an emblem and landmark of the circuits and cultural industries internationally.

Thus, from the perspective of cultural tourism, it is possible to say that the 1990s coincided with the early stages of TALC model designed by Butler (1980). In these years, Bilbao witnessed a series of transformations in cultural activities and equipment that have led to the gradual professionalization of Metropolitan Bilbao as a cultural tourist destination. In these early stages, the involvement of local actors and the involvement of the government are the dominating forces, along with a transformation of the transport and tourism industry.

According to the TALC model (Butler, 1980), once this first phase is achieved, a market area develops around the nucleus of initial development. In the case of Bilbao, this development is placed in the area nearby the Guggenheim Museum, the core of the cultural industry, where various initiatives are carried out (see Velilla & Rodríguez-Escudero, 2005).

From a tourism perspective, the growth of demand for cultural tourism meets the supply of accommodation and catering from the private sector. The new international demand requires the creation or adaptation of the hospitality industry and growth in the supply of accommodation.

In the early twenty-first century, there are a series of changes that are transforming cultural tourism in a new direction, towards the orange creative tourism.

5. Analysis of the cultural offer of Bilbao — Bizkaia

In this part of the study the model proposed by Tresserras (2015) will be the driving model. The analysis of the resources and products of the area will be conducted taking into account the promotion on the official tourism websites of public administrations.

The Basque Country (the autonomous community), is located on the north-east of the Iberian Peninsula, and it has been a predominantly industrial region until the early twentieth century. In the three provinces that constitute the Basque Country: Araba, Bizkaia and Gipuzkoa, it is Bizkaia (Biscay) which has emerged as the main Basque industrial region. Its industrial activity was confined mainly along the waterway of the capital: the river of Bilbao (Ria de Bilbao) (Cava, 2008). The industrialisation in the estuary of Bilbao and nearby towns was developed mainly during the second half of the nineteenth century changing from a rural to an industrial landscape (Alonso, 2005; Rodríguez-Zulaica, 2013). This deep urban and demographic transformation will forever mark the character and identity of the town and its inhabitants.

However, in the 1990s, after a deep industrial crisis, Bilbao faced the challenge of maintaining its leadership position, on a new economic and social scene. The transformation of Bilbao, from an industrial city to a modern and cosmopolitan city of services has been studied by authors such as Maria Gomez (1998), Arantxa Rodriguez (1998, 2001, 2002) and Jordi Tresserras (2001, 2004), among others (Rodríguez -Zulaica, 2013).

The metropolitan area of Bilbao or the “Metropolitan Bilbao” consists in total of 35 municipalities of Biscay, the 25 municipalities are part of the so called Gran Bilbao (i.e. Baraaldo, Sestao, Portugalete, Santurce, Alonsótegui, Erandio, Lejona, Getxo, etc.), and another 10 municipalities: Arrankudiaga, Keg, Berango, Górliz, Lemóniz, Plentzia, Sopelana, Miravalles, Urdúliz, and Zeberio, according to the Guidelines Spatial Planning of Euskadi (Basque Government, 2014b), defining the functional area of metropolitan Bilbao.

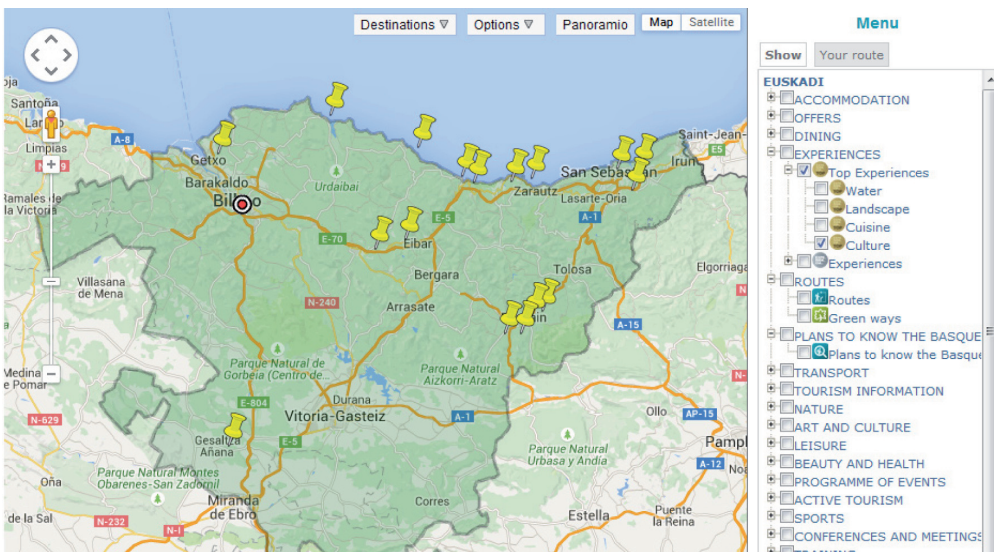


Illustration 6. Top Experiences in Biscay (Euskadi.eus).

Taking into account recent data, it seems clear that tourists are consuming the resources, products or experiences that are well-known in the territory, which are nearby the city of Bilbao. However, if we take into account the offer of the top experiences in Biscay, we see that they are placed far from the city, being mostly at the seaside, as it is possible to see in the map below (Illustration 6).

Furthermore, and taking into account the resources related to art and culture available in the territory, we can see that there are elements that are available in every part of this province (see Illustration 7). However, tourists hardly get to those points, probably because they have not been promoted in a right way, or because they are not related to any known activity.

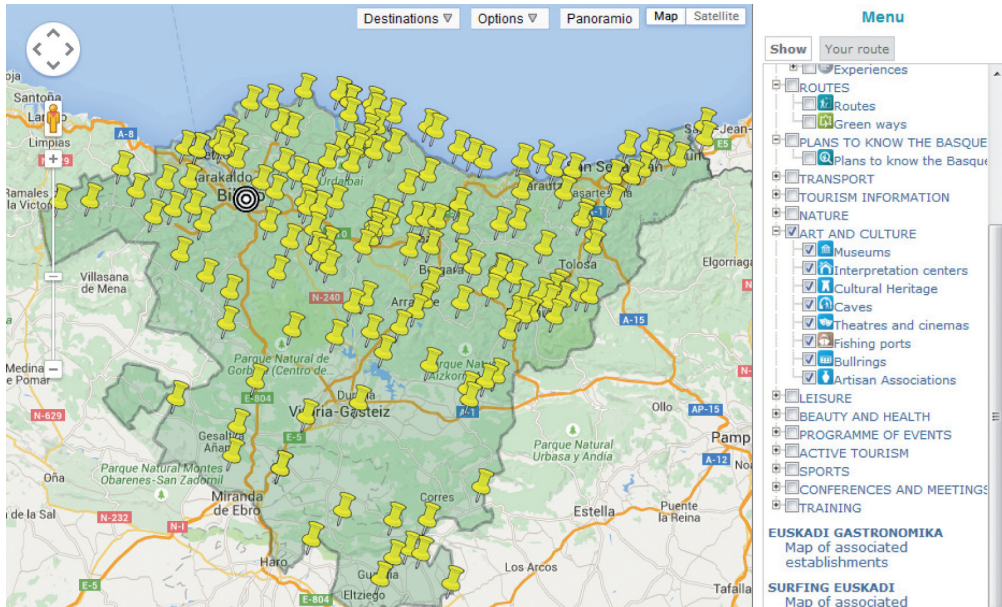


Illustration 7. Art and culture elements in Biscay (Euskadi.eus).

Figures demonstrate that currently the consumption of activities does not match the products available in the territory. This factor highlights the need to cluster tourism-related activities and products, to develop meaningful experiences in the wider territory of Biscay, moving beyond the nucleus of Bilbao.

6. Future directions

In an increasingly globalised market, how can tourists soak in the local, live experiences outside of the usual tourist haunts?

After the analysis of the situation of the area of Bilbao from the tourism perspective, it is possible to say that the sector needs to be, if not reinvented, reconfigured or re-planned. This paper focuses reorientation on two main directions. On the one hand, it is proposed to reconsider the typology of tourism, moving beyond the traditional concept

of cultural tourism to a more creative and socially engaging tourism typology, as it has been proposed by Richards (2011) and Tresserras (2015).

Richards supports creative tourism since it is not just a ‘hot’ topic for tourism, but it has also become “cool”. Skills, originality, creativity, narrative, intercultural and transcultural, authenticity and everyday life are the key elements of creative tourism. Creative tourism development in any of its forms (crafts, design, food and wine, health, languages, spirituality, nature and landscape, sports, traditions) allows to give visibility to destinations.

On the other hand, it is considered that tourism should also be decentralised in terms of tourist products, activities and events. That is to say, it is necessary to move beyond, from a tourist activity centred on the ICON to a wider territory. As it has been mentioned in this chapter, tourism has been developed in Bilbao around the Guggenheim museum, which has been considered an “icon” for the urban regeneration (Gonzalez, 2011) and for tourism development. However, it was possible to see that there are many activities beyond the initial touristic core. Bilbao area, and the province of Bilbao have many cultural products and resources that could easily be used to develop further tourism activities in the wider territory. Furthermore, the development of further activities is considered to be crucial, since the tourist that comes to this area is a tourist that returns, and therefore, it is necessary to offer something else apart from the activities, in which they participated previously. For that purpose, it is necessary to identify the right product, by taking into account the public authorities, both the regional and local authorities, and private companies from the tourism industry that allow to identify the available resources to develop further tourist activities.

That is the starting point for the development of the right marketing strategies around a specific brand, using adequate information channels. The problem of this territory (Basque Country, Biskay, Bilbao) is that there have been multiple images and brands delivered to make the territory known to the tourists, which has created a kind of uncertainty about what is available.

Marketing strategies would need to develop clear promotion and communication strategies. Analysed data shows that the main information sources that encourage tourists to visit the territory are mainly friends and family (53.1%) and the Internet (47.5%) (see Illustration 8 below).

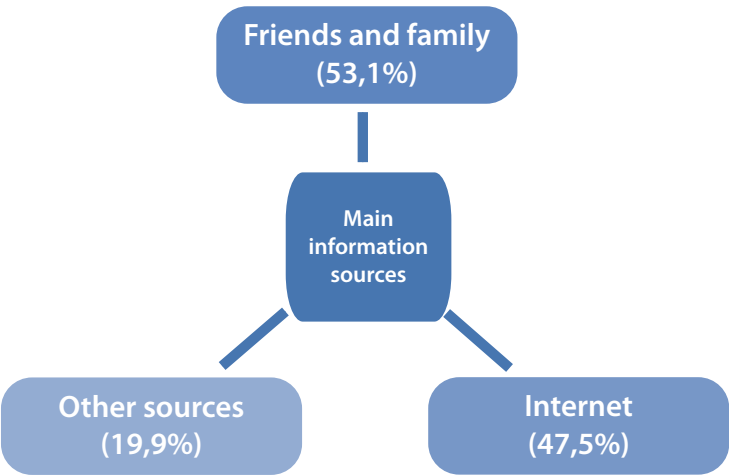


Illustration 8. Means that propitiates the visit to Biscay (Bilbao-Bizkaia, 2014).

With this information we could see that there is a place for further promotion activities. These promotion activities will need to take into account the segmentation of the current demand, but in line with the future directions of the tourism resources, products and experiences that are interesting to develop. It will be necessary to identify the niches and products to identify proper brands to develop the promotion strategies. Furthermore, it will also be necessary to identify the territories, in which promotion strategies should be reinforced. The identification of those territories is currently being done by public institutions, however, it is not clear, which are the steps that they have followed to identify them.

The diffusion and promotion activities should therefore take into account the activities that differentiate the territory from the rest. This is to say, by promoting activities that are somehow engaged with the elements that make the territory competitive, at a national and international level. Those elements include the experiences related to eno-gastronomy, the authenticity and uniqueness of the Basque culture, specialised well-being establishments, access to nature and, lately, lifestyle elements that are so appreciated by international tourists (see Illustration 9 below).

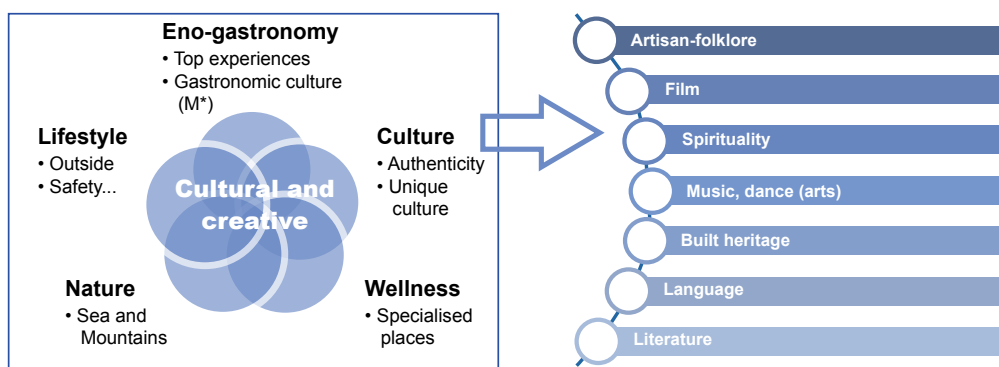


Illustration 9. Complementary offer in Bilbao-Biscay (own studies).

Conclusions

As mentioned above, cultural tourism is a type of tourism that is currently very demanded and booming, offering great opportunities as a factor of economic and social development of regions in search of new economic activities.

However, one of the main problems that face cultural tourism in Euskadi is the promotion of their products. As noted, cultural tourism is shaped in turn by niches within the same individual demand which is less than that experienced by products such as the Guggenheim Museum. We have found out that various public authorities focused their efforts on flagship products (Guggenheim, etc.), leaving the promotion of other minority resources behind.

Consequently, we have a community that has got interesting cultural tourism resources, which, however, remain unknown to the vast majority of citizens and tourists. Right now, the biggest challenge is to make them visible to the public.

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