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## TRENDS IN TOURISM DEVELOPMENT AFTER A EUROPEAN CULTURAL CAPITAL PROGRAMME

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The European Capital of Culture staged in Sibiu during 2007 was a unique event. It was the first European Capital of Culture (ECOC) to be staged in one of the post-2004 EU accession countries, and it represented a major challenge in being staged just as Romania was joining the EU.

The main aims of the 2007 ECOC in Sibiu were:

- Raising the international profile of Sibiu
- Long term cultural development
- Attracting international visitors
- Enhancing feelings of pride and self-confidence
- Growing and expanding the local audience for culture
- Improving social cohesion and creating an economic downstream
- Improving cultural and non cultural infrastructure
- Developing relationships with other European cities/regions and promoting European cultural cooperation
- Promoting creativity and innovation

The original evaluation report published in 2007 by ATLAS (Richards and Rotariu, 2007), indicated that the event programme

had successfully met many of the short-term aims, attracting large numbers of visitors, increasing cultural participation and improving the image of the city in Romania and abroad.

This study about the impact of the European Cultural Capital in Sibiu in 2007 is part of an ongoing programme of research initiated by the European Association for Tourism and Leisure Education (ATLAS) in 1999 and in progress for the Municipality of Sibiu in 2009.

### Methodology

In order to help evaluate the extent to which Sibiu 2007 was successful in achieving its aims, visitor surveys were undertaken at a number of different events within the cultural programme. The surveys were conducted by the “Lucian Blaga” University of Sibiu, utilising the research tools developed for previous ECOCs, which were originally based on the Cultural Tourism Research Programme of the Association for Tourism and Leisure Education (ATLAS). Details of these previous studies can be found in Richards, Hitters and Fernandes (2002) and Herrero et al. (2007).

Number of surveys completed per year (includes Sibiu residents and tourists)

	2001	2004	2005	2007	2008	2009
Total	346	236	357	1118	511	1079

The aims of the research in Sibiu were to monitor the development of tourism in the city, and to evaluate the impact of the 2007 ECOC. Visitor surveys were conducted to examine the motivations, activities, attitudes and expenditure of tourists in Sibiu and in general and specifically those visiting 2007 ECOC events. In addition to measuring the economic spin-off of the event, an important objective was to examine the image that visitors had of Sibiu, and to evaluate whether Sibiu 2007 ECOC had had any effect on that image. The Sibiu research is unique in that the monitoring of tourists began a number of years before the ECOC.

### Motivations for visiting the cultural capital

The European Cultural Capital is an event which attracts large numbers of visitors. It is also clear, however, that not all the participants in a specific event in the programme are there because the event is part of the Cultural Capital. In the case of visitors from outside Sibiu, it is particularly important to know if their trip has been stimulated by the Cultural Capital, or if they are travelling for other reasons. There are often events in the programme which would have taken place anyway (such as the ASTRA Film Festival in Sibiu, now in its 16<sup>th</sup> year), and some visitors may not know that an event

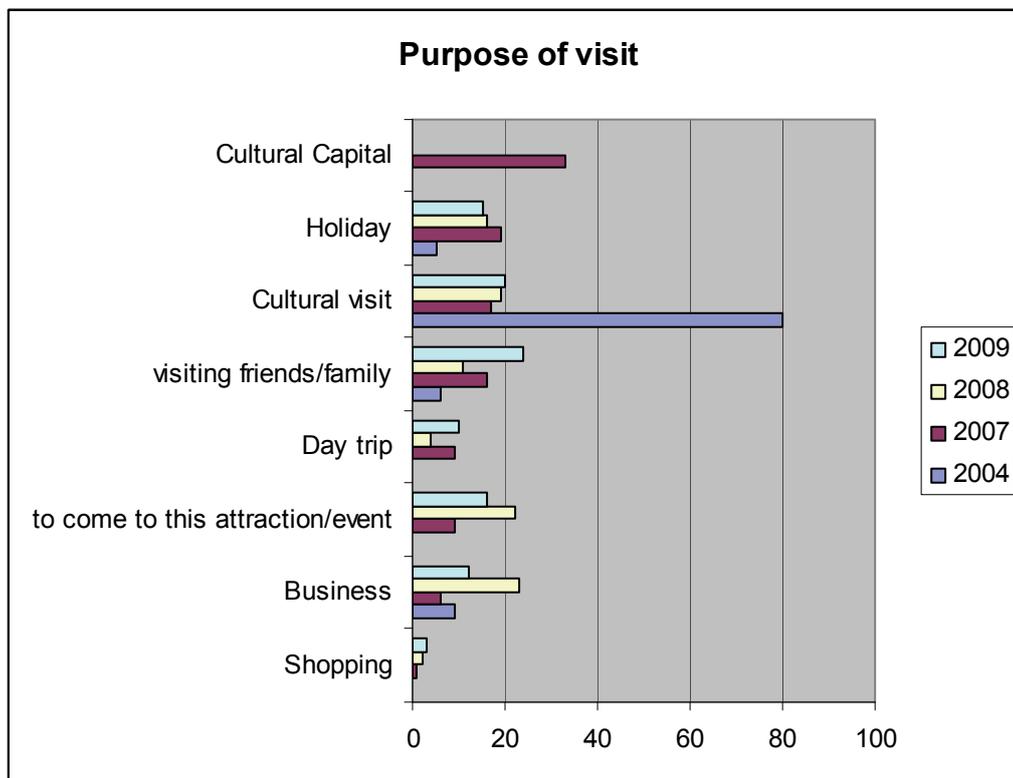
is part of the Cultural Capital programme (Richards, Hitters and Fernandes 2002).

Almost a third of those travelling from outside Sibiu in 2007 indicated that the reason for their visit was the Cultural Capital. This is a relatively high proportion compared to the Cultural Capitals in Rotterdam and Porto, although a similar level to that in Salamanca. This is probably because the situation of Sibiu is similar to that of Salamanca, because both cities are relatively isolated from other major population centres in their respective

countries. It is therefore more likely that visitors travelling to Sibiu from other parts of Romania or abroad will need to make a specific trip in order to attend the Cultural Capital. This is also confirmed by the fact that the Cultural Capital was far less likely to be a visit motivation for regional visitors (13%) than domestic tourists (40%) or foreign tourists (47%).

Not surprisingly, the Cultural Capital was also a stronger motivation for those employed in the cultural sector (45%).

*Motivations for visiting Sibiu, 2007-2009*

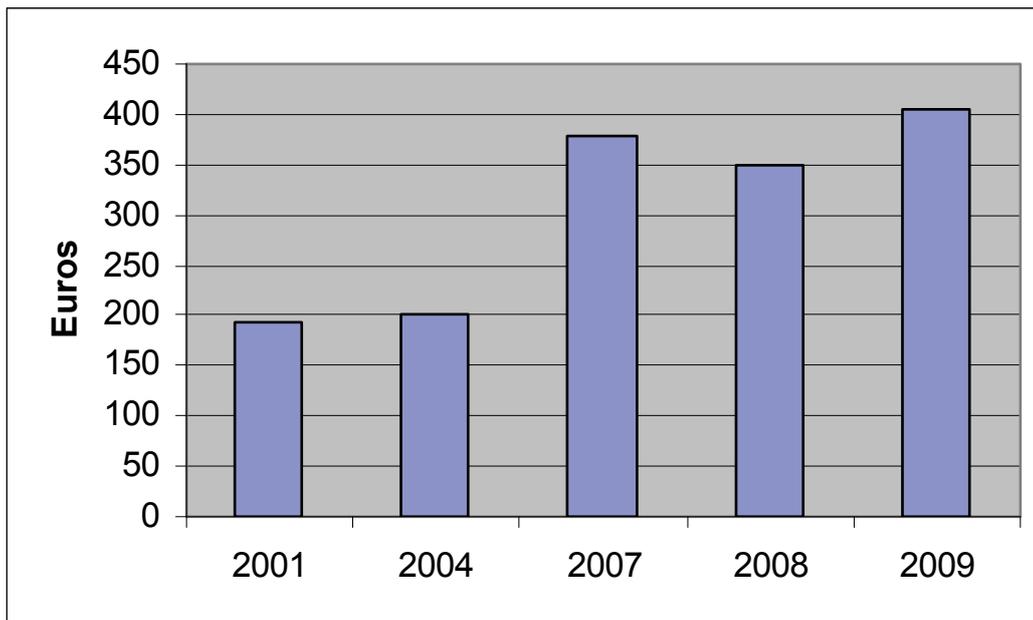


**Economic impact**

An important aspect of the ECOC is the economic impact that it can have on the host city. The bulk of the economic impact of the ECOC usually comes from visitor spending, because visitors inject new money into the local economy. In 2007 we estimated that the total economic impact directly attributable to staying visitors to the ECOC was €19.35

million. It is difficult to compare this figure directly with other years, because the ECOC as a direct visit motivation is no longer there. However, the figures on average visitor spending show that spend levels have increased since 2007. The average visitor to Sibiu now spends almost twice as much as the average visitor before 2007. Again, this underlines the structural change in the nature of the tourist market.

*Average total visitor spend*



Total average visitor expenditure increased very little between 2007 and 2009. This is basically because the ECOC attracted a relatively high number of foreign tourists and

other high spending guests. In 2009 relatively more was spent on shopping and admissions, and less on travel (reflecting the higher level of domestic tourism).

*Visitor spend by category (excludes Sibiu residents)*

	Travel spend	Admission	Food and drink	Shopping	Accommodation
2007	130,08	17,72	74,96	68,51	141,88
2009	77,02	44,61	98,83	132,62	144,62

If we exclude travel expenditure, however, the spending by visitors in the city of Sibiu itself was significantly higher in 2009.

*Spend in Sibiu (excluding travel costs)*

	Total
2007	303,06
2009	420,68

Expenditure was particularly high for hotels guests, who tended to spend almost twice as much as other visitors. It is likely that this trend will continue as a result of the international crisis.

In terms of the accommodation used by visitors, it is clear that there is still much

informal accommodation use, such as staying with friends and family. However, the diversification of commercial accommodation in recent years is also clear. Although the proportion of visitors using hotels has not increased over the years, the number of hotel guests has risen as the tourism market has grown.

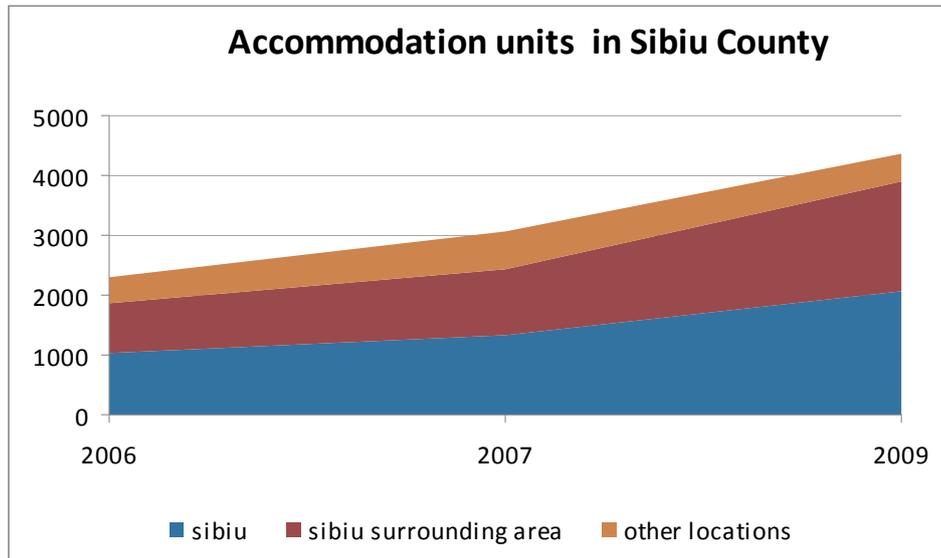
*Accommodation used*

	2001	2005	2007	2008	2009
Campsite	5	5	1	4	2
Youth hostel	2	2	5	23	5
Own home	7	6	8	10	15
Guest house		0	10	7	15
Self catering	14	4	11	10	7
Bed and breakfast	13	2	15	7	3
Hotel	24	28	23	23	23
Friends, family	35	53	26	15	31
		100	100	100	100

The county of Sibiu has recorded a spectacular growth of accommodation capacity as a result of the ECOC, with the majority of new facilities

being located in the city of Sibiu and the immediate surrounding area.

*Accommodation capacity in Sibiu County, 2006-2009*



An important aspect of the economic impact of tourism is the proportion of visitors who actually stay in the city or local region. Tourists using accommodation locally spend money directly in the local economy, whereas visitors staying elsewhere have a much lower

impact. In the case of Sibiu the proportion of visitors staying in the city itself is very high, and has increased since 2007. This again indicates that the economic impact of tourism in Sibiu has grown since the ECOC.

*Location of accommodation used by visitors to Sibiu*

%	2007	2008	2009
Staying in Sibiu	69	76	72
Staying in Sibiu region	18	21	19
Staying in Transylvania	6	2	4
Staying elsewhere	5	1	3
Staying abroad	2	0	1
	100	100	100

Although the volume of tourism has grown, the average length of stay for tourists has remained relatively low. This underlines the continuing role of Sibiu as a transport hub in

the region and the importance of business tourism. It appears that the ECOC boosted the length of stay for foreign visitors, but this declined fairly rapidly afterwards.

*Average length of stay for Romanian and foreign tourists (according to official hotel statistics)*

	2007	2008	2009*		2007	2008	2009*
medium overnight							
total				foreigners			
	1,61	1,42	1,35		1,71	1,50	1,30
2009* = Jan. - Aug.							

The length of stay reported by visitors in our surveys is on average longer than the official hotel statistics would suggest, but this is at least partly due to a much longer average stay

for visitors who stay with friends and relatives or use other non-commercial forms of accommodation.

*Nights away from home*

Mean / Visitor origin	2001	2004	2005	2007	2008	2009
Sibiu Region				6,1	12,1	10,5
Elsewhere in Romania			6,4	4,1	8,9	10,4
Abroad			10,0	6,7	9,9	7,9
Total	6,6	5,4	7,4	5,5	11,5	9,8

### Impacts of the ECOC

Our surveys demonstrate clearly that the vast majority of people feel that the ECOC has had a positive impact on Sibiu. The impacts most frequently mentioned by respondents are an improvement in the image of the city, bringing the city closer to Europe, the economic impact of the event and improvements to cultural facilities.

The majority of respondents also agreed that the ECOC had created more social cohesion in

Sibiu and improved the overall quality of life. This is a very good result, given the more intangible nature of these impacts.

It is also significant that the perceptions of impacts have remained strong even in the years after ECOC. In most other cities the memory of the ECOC quickly fades, and people are often far less able to see the benefits. But Sibiu exhibits relatively little decline in appreciation of the impacts, which suggests the dramatic nature of the changes in some areas.

*Impact on Sibiu*

% totally agree	2007	2008	2009
Improved the image of Sibiu	98	92	96
Brought more money to Sibiu	94	82	78
Improved cultural facilities	89	79	80
Created more social cohesion	67	62	64
Improved the quality of life	53	61	54
Brought Sibiu closer to the rest of Europe		85	85

*Impacts of ECOC 2007 by origin*

% totally agree	Sibiu	Elsewhere in Transylvania	Elsewhere in Romania	Abroad
Improved the image of Sibiu	99,1%	95,4%	95,8%	88,7%
Brought more money to Sibiu	86,3%	72,3%	77,5%	75,5%
Improved cultural facilities	85,8%	79,0%	79,3%	79,2%
Created more social cohesion	69,2%	67,5%	57,3%	60,4%
Improved the quality of life	60,0%	56,4%	55,9%	44,2%
brought Sibiu closer to the rest of Europe	90,1%	83,4%	86,0%	77,4%
you think there is more attention for Sibiu in the national media as a result of the European Capital of Culture?	86,5%	80,7%	79,1%	61,5%
Do you think there is more attention for Sibiu in the international media as a result of the European Capital of Culture?	63,3%	55,1%	57,7%	54,7%
Overall, do you think Sibiu made good use of the opportunity of being European Capital of Culture in 2007?	91,9%	78,7%	82,8%	81,1%

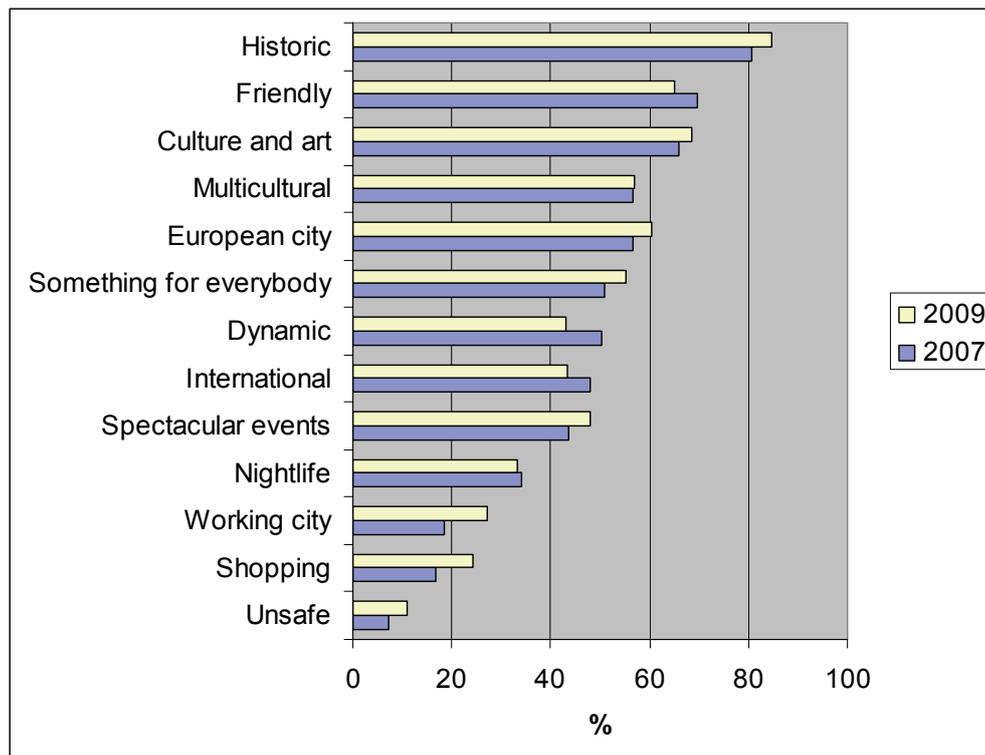
For visitors from outside Sibiu who had visited the European Capital of Culture in 2007, their impressions of the city tended to be more positive than people who did not visit in 2007. This indicates that the ECOC had a lasting effect in improving the image of the city and making visitors positive about Sibiu. In particular, those who visited the city in 2007 were much more likely to appreciate the

social cohesion impacts of the event than other visitors.

**The image of Sibiu**

The image of Sibiu has remained fairly positive since 2007. The strength of its image as a city with history and culture and art has increased slightly, as has its image as a European city.

*Image elements for Sibiu, 2007 and 2009*



It is obvious that the image of Sibiu for a wide range of elements is not as strong for foreign visitors as Romanians, who are much more likely to have been to the city before. Foreign visitors are less likely to see Sibiu as international or European, but on the other

hand they are just as likely as Romanian visitors to see the city as a friendly, historic city of culture and art, which shows the positive image impacts of the ECOC and other recent developments.

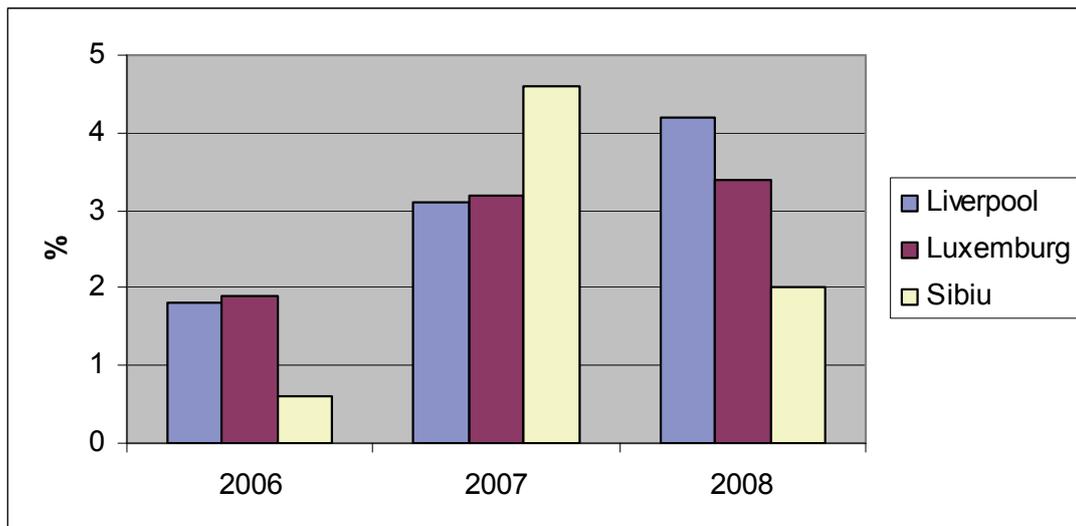
*Image elements of Sibiu by visitor origin*

	Sibiu	Elsewhere in Transylvania	Elsewhere in Romania	Abroad
International	43,9%	47,9%	41,5%	36,5%
Culture and art	69,1%	66,2%	68,4%	67,9%
Friendly	61,8%	63,1%	65,3%	66,0%
European city	63,1%	55,7%	60,1%	43,4%
Multicultural	56,8%	53,8%	57,1%	49,1%
Shopping	24,8%	25,6%	24,1%	9,4%
Working city	31,2%	21,5%	22,1%	13,2%
Unsafe	11,2%	11,9%	3,8%	13,2%
Nightlife	30,3%	37,8%	28,7%	26,4%
Dynamic	40,7%	41,7%	43,4%	39,6%
Historic	83,4%	81,5%	88,7%	88,7%
Something for everybody	52,9%	53,1%	56,8%	62,3%
Spectacular events	46,2%	45,6%	50,7%	47,2%

Looking at the ATLAS surveys conducted in other parts of Europe, it is also clear that Sibiu has had a positive impact from the ECOC outside Romania as well. Particularly in 2007 the external image of Sibiu raised very strongly, particularly as a result of the

novelty value of a new European destination being exposed in the international media. Although Sibiu has not scored as highly in subsequent ATLAS surveys, it still has a much higher score than before the ECOC.

*Image of Liverpool, Luxemburg and Sibiu as cultural destinations in ATLAS surveys in Europe*



## Conclusions

Our research indicates that the Sibiu 2007 ECOC has been successful in reaching a number of its major objectives. The ECOC has generated noticeable changes in local life and in the image of Sibiu as a town and a tourist destination as well. The growth of tourism caused by the ECOC has been greeted with enthusiasm by local residents, who are clearly aware of the benefits the event helped to generate. The impact of the ECOC on tourism flows has already started to wane, particularly as the effects of the economic crisis are felt, but there is also a more lasting legacy in terms of the positive attitude of citizens and the improved external image of the city.

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