

Chapter 1

Industrial Tourism Development in Cities: Towards a Framework

1 Introduction

Industrial tourism is a type of tourism which involves visits to operational companies and industrial heritage; it offers visitors an experience with regard to products, production processes, applications, and historical backgrounds. More than 100 years ago public and private organisations already started to organise industrial tourism visits. Historic examples include visits to French wineries and chocolate factories, to Greek and Maltese lace-producers and to Dutch cheese producers. In Paris, tourists and residents had the opportunity to choose among various tours back in 1900. The tours on offer ranged from visits of textile-factories to tours of mortuaries and slaughterhouses. Furthermore, also a visit to a tobacco factory, the stock exchange, the parliament and the court of justice were possible. There is also evidence from the United States that industrial tourism has actually a long history; a good example is the Jack Daniel's distillery in Tennessee which began to offer factory tours back in 1866, the year when the company started operating (Frew, 2000).

Industrial tourism offers opportunities for individual firms, but also for cities. Particularly for cities with a considerable industrial base, industrial tourism comprises interesting possibilities to strengthen the economic structure (direct and indirect employment) and to increase the supply of tourist products. For such cities industrial tourism is a potential growth sector that matches with their identity: the sector offers opportunities to strengthen their distinctiveness and image, notably by building on their existing assets. Many cities, however, have the assets to develop industrial tourism but fail to capitalise on them. In most cases industrial tourism is only restricted to low-profile company visits, without any clear vision of the municipality or firm on the strategic value of it, not to mention coordinated product development.

The development of industrial tourism largely depends on the ability of firms to cooperate. On the one hand, we observe that many firms consider company tours an obligation with more costs than revenues. Many companies are afraid of leaking confidential business information, and also security often constitutes a problem. On the other hand, more and more companies also recognise the opportunities of industrial tourism: industrial tourism can help to market their product, to secure their license to operate (reputation), and to remain attractive as employer. From the observation that industrial tourism offers opportunities for city and enterprise,

and the fact that in many cities these potentials are not utilised to the full, this book addresses the question: under what circumstances can industrial tourism make a strategic contribution to the competitiveness of city and enterprise?

This book provides insight into the opportunities of industrial tourism development, the barriers that obstruct the utilisation of potentials, and the possibilities to reduce these barriers. In the present chapter we develop a conceptual framework that identifies the conditions for successful industrial tourism development, based on literature study. In the next chapters, the framework will be assessed by applying it to six case studies: Wolfsburg (Germany), Cologne (Germany), Pays de la Loire (France), Turin (Italy), Shanghai (China) and Rotterdam (The Netherlands). In the final chapter we compare the different case studies and formulate general conclusions and recommendations. For the case studies, information has been collected by means of desk research and semi-structured interviews with representatives of stakeholders in industrial tourism.

In the present chapter we first define the term industrial tourism (section two) followed by an analysis of the demand-side (section three) and supply side (sections four and five) conditions for a successful development of company visits. The sixth section analyses the conditions under which the interests between the public and private sector concerning industrial tourism converge. The final section presents a general frame of analysis to be applied to the case studies, formulating four conditions for developing industrial tourism successfully.

2 Defining industrial tourism

Industrial tourism is a relatively unexplored research theme, with a lack of clear concepts and definitions. First, the term industrial tourism has different meanings. Particularly in the US, some use the term industrial tourism when they talk about a commercial approach to tourism, maximising the return on investment (for example Wemhaner, 1976). From this point of view, industrial tourism implies the marketing of tourism as a commodity to be sold for mass consumption (Abbey, 1968). Second, other terms are used to describe the same phenomenon. In some cases, this seems only a difference in language: *Industrietourismus* (German), *tourisme industriel* (French), *industriële toerisme* (Dutch), *turismo industrial* (Spanish), *turismo industriale* (Italian), etc. However, it appears that in some countries industrial tourism is mainly about visiting operational firms, while in other countries it refers to visiting industrial heritage (non-operational firms), or comprehends both meanings. In Germany and France, for instance, many people associate industrial tourism with industrial heritage, and not with visiting operational firms. The terms *Werkstourismus* (factory tourism) or *Betriebsbesichtigungen* (company visits) are more widespread in Germany, while also the French prefer to use the more neutral *visites d'entreprises* (company visits). In the Anglo-Saxon literature it is common to make a distinction between industrial tourism (visiting operational firms) and industrial heritage tourism. In other countries, the term industrial tourism is not

very common. Instead, people use the more neutral terms company visits or factory tours. The main advantage of using these labels is that they are not directly associated with tourism and (leisure) tourists, thus allowing for various motives to visit a company (leisure, education, knowledge exchange, etc.). Others talk about technical visits in case of visits with an educational or professional motive. Also the name industrial attractions is widely used. Especially in Japan the term industrial sightseeing is used as a synonym for visits to operational companies.

Also among scholars we observe some confusion when it comes to defining industrial tourism. Frew (2000: 20) states in her empirical study of industrial tourism attractions that ‘industrial tourism involves visits by tourists to operational industrial sites where the core activity of the site is non-tourism oriented’. Visits to non-operational firms are obviously excluded from this definition. Soyez defined industrial tourism as movements caused by the appeal of former or operational

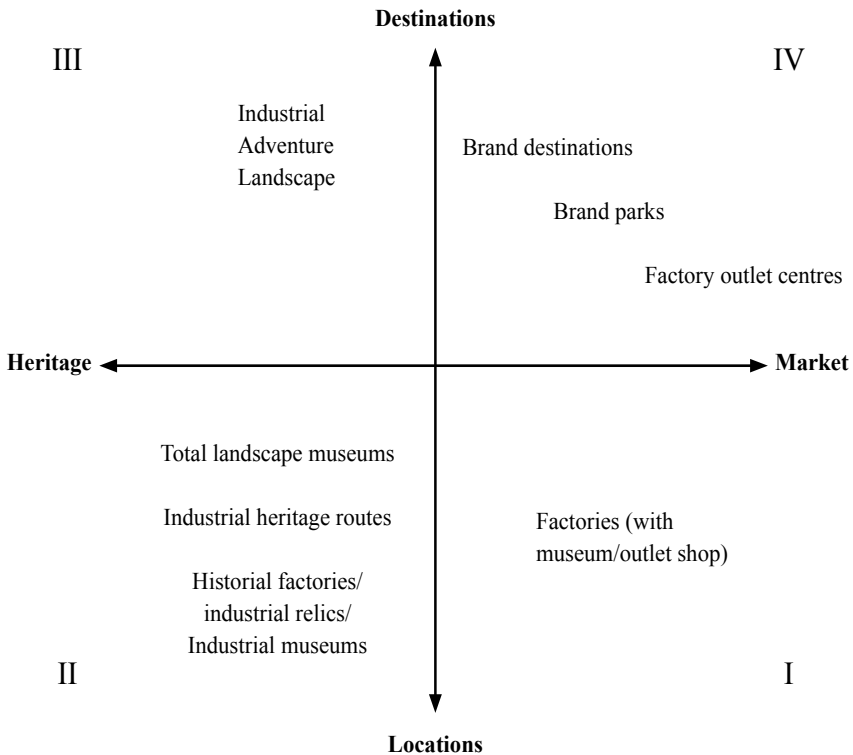


Figure 1.1 A two-dimensional model for categorising industrial tourism products

Source: Industrial tourism destination management in Germany: A critical appraisal of representation practices (Li and Soyez, 2006), with permission.

industries on external visitors (1993). Marcon et al. (2000) consider visits to operational firms as one of the three categories of economic discoveries, the other two being science tourism (including visits to museums and science centres) and industrial heritage tourism (*le tourism de patrimoine industriel*). Li and Soyez (2006) present a two-dimensional model for categorising industrial tourism products, with the horizontal axis indicating the difference between heritage and market (operational firms) and the vertical axis going from locations to destinations. Company visits combine a location with the market, whereas brand parks are examples of destinations in the market.

We also observe some disagreement concerning the 'industries' that are to be visited. Yale (1991) defines industrial tourism as the presentation of contemporary manufacturing processes, thus leaving out visits to service companies. In a similar way, Swarbrooke (1995: 51) talks about factory tourism defined as 'visits to working factories to see industry in action, mainly manufacturing industry'. MacCannel (1976), however, states that all firms in society can become a tourist attraction if they want. Frew (2000) uses a similar approach, arguing that the term industry in industrial tourism should be read as sector not as manufacturing. This last view goes along well with the standard definition of industry of Hill et al. (1975): this definition of industry not only refers to companies that produce tangible goods, but also includes for example services. Industry comprises agriculture, forestry, fishing, mining, construction, wholesale trade, finance, insurances, real estate, services, retail, transport, communications, energy, health services and production. According to these scholars, manufacturing (production) is only one part of industry. According to Frew (2000), industrial tourism products can be categorised according to their tangible or intangible character. Some companies produce goods that you can touch, see and sometimes even smell or taste during a company tour (e.g., a brewery or a chocolate factory). Other organisations deliver intangible goods: a tour through the parliament or through an educational institution will mainly show the services that are delivered by these institutions. Carter (1991) states that company tours not only inform people about production processes but also about how a company is managed.

3 The demand for industrial tourism

Trends in tourism

Before we discuss the development of industrial tourism (the supply side), we first need to assess the demand for industrial tourism. Many scholars and professionals claim that this demand will grow, but on what grounds? They mainly refer to trends in tourism.

The first argument is that the tourism industry is growing, due to a globalising world that allows more and more people to travel. Between 1990 and 2006 the number of tourist arrivals worldwide increased with more than 100 per cent (from

436 to 846 million) (UNWTO, 2007). Considering the countries tourists come from (outbound statistics), it appears that particularly Asia, the Middle East and Africa show high annual growth rates (6.4 per cent; 10.3 per cent; 7.1 per cent, average: 3.6 per cent). The World Tourism Organisation predicts a further growth of the tourist industry to more than 1.5 billion arrivals in 2020.

The countries of Western Europe belong to the most mature origin markets for tourists worldwide: a broad scope of people from all social classes engage in tourism. Increasing real incomes and leisure time, coupled with declining costs of travel and an increasing car ownership rate, lead to a growing demand for recreation and holidays (Williams and Shaw, 1992), which is what we could observe in the Europe over the past decades. According to Williams and Shaw (1992) this is the reason why tourism is regarded commonly as one of the economic sectors which has realistic potential for growth beyond the short term. A further increase of income and leisure also went along with a growth of second and third holidays, including a trend towards short breaks and especially towards urban tourism. This growing demand for tourism is distributed between domestic and foreign destinations, thus we can observe a growing demand both for the domestic and the foreign market.

As we have seen above, destinations that are far away show high growth rates. This indicates that the tourists themselves have become more mature and demanding: after already having visited rather traditional tourist attractions/ places like London, Paris or Venice, they long for more exotic destinations far away. Analogically, this observation also implies that 'the well travelled tourist' is already saturated by 'classic tourist cities' and standard tourist attractions like churches, museums and so on. This offers new opportunities for urban tourism in second cities that are not (yet) on the shortlist of the 'must see attractions'. Van der Borg (1994) notes that especially the Netherlands, Germany, the UK and Denmark can be characterised as very mature outgoing tourism markets; this is also reflected in the destinations tourists from these countries tend to visit. Tourist flows from these highly mature outgoing markets are much more diversified than those in less mature markets for outgoing tourists, like Spain: Spanish tourists still tend to visit the classic tourism cities (Van der Borg, 1994). But of course, the matureness of outgoing tourism markets is subject to constant change, and as more and more (European) countries enter the mature stage, also the demand for visits to secondary cities and attractions will increase.

Especially cities that have an alternative blend of attractions on offer, like industrial tourism attractions, can be interesting for experienced tourists that have already seen most of the must see attractions. Especially foreign countries with a lot of mature and demanding tourists are interesting target markets for industrial tourism. Taking into account the domestic visitor market for industrial tourism, we can assume that cities can consider their location within a mature outgoing tourist market (like the Netherlands or Germany) as an advantage; a higher number of mature tourists potentially comes along with a higher domestic demand for industrial tourism. Industrial tourism attractions that are located in regions with

a high population density, like the Dutch Randstad or the German Ruhr area may have an additional advantage in terms of domestic tourism: a high absolute number of local and regional visitors can be expected.

Industrial tourism is not only a relevant market for second cities, but also an interesting addition for rather traditional tourist cities that are already successfully attracting tourists; visitors ask for a variation of the standard urban tourist programme, and industrial tourism could be an interesting tool to 'add some spice' to the existing tourist attractions, and hence create more appeal for second time visitors. Urban tourism consists of two very distinctive main strands: on the one hand cultural tourism and on the other hand business/conference tourism. According to Murphy (1982) cultural tourism is very much linked to learning. Taking a wider view of the first strand of urban tourism, this includes cultural and learning experiences, both of which can be provided by industrial tourism.

The importance of learning is also underlined by Martin and Mason (1993), who predict that visitors will become more selective in the future, concerning the choice of visitor attractions. In the future, visitors will pay more attention to purposeful visits, thus visiting places and attractions that are related to their specific interests. The share of tourists that visit an attraction just for the sake of spending their free time – and without any further purpose – will become smaller and smaller in the future. What Martin and Mason actually predict is a shift in the popularity of attractions: a shift from passive attractions to active attractions, and a shift from pleasure to education. This shift implies that traditional museums or visits of historical houses will diminish, while for example visitor numbers of interactive science parks and museums will increase. What could this mean for industrial tourism? Industrial tourism is an educational experience and is well placed on the market in this respect, but its relative position towards other tourist attractions could be even enhanced further if the visitors can be involved actively in (certain steps of) the production process, for example by being allowed to operate a machine.

Evidence of increasing demand

Regrettably, the World Tourism Organisation does not provide any insight in the demand for company visits or industrial tourism. To assess the demand for company visits, we depend on various national and local sources. For instance, in New South Wales (Australia) more than 10 per cent of the tourists visited an industrial tourism attraction in 2004. In the same year, almost eight million people visited an industrial site in France. In the UK, industrial tourism could attract around five million visitors per year in 1989. One year later 294 UK companies were open for visitors; these companies accounted for 6 per cent of all British tourist attractions (!). Frew (2000) provides an overview of some industrial tourism attractions (in the US, the UK and Japan) and their visitor numbers, giving an idea about the dimension of industrial tourism (see Table 1.1).

Table 1.1 A selection of visitor attractions in the UK, Japan and the US¹

Industrial Tourism Attraction	Visitors per year
Cadbury World (UK, chocolate factory)	400,000
Toyota Motor Corporation (Japan)	300,000
Ben and Jerry's Homemade (USA, Ice-cream Production)	170,000
Wedgwood (USA, Pottery Factory)	100,000
British Nuclear Fuels (USA, Nuclear site clean-ups)	100,000
WR Outhwaite and Son (USA, Ropemakers)	75,000–100,000
Cumberland Pencils (USA)	64,000

Source: Frew (2000)

These numbers suggest that there is demand for industrial tourism from the broad public, and not only from a few special interest groups. Furthermore we can see that not only attractive consumer products like chocolate or cars can attract huge visitor numbers. Immense visitor interest is also directed towards 'business to business products' like nuclear fuels or ropes. Especially for the manufacturing sector, the character of the goods (business to business or consumer goods) seems to be secondary – both Harris (1989) and Prentice (1993) note that there is an increasing public interest in the manufacturing sector in general. In the United States and in Europe, the shift from a manufacturing to a knowledge economy has dislocated people spatially and culturally from the manufacturing sector. Especially the younger generation has very little knowledge about industrial work; according to Harris and Prentice, this lack of knowledge naturally leads to an increasing curiosity about the topic, and thus to a demand for company visits in the manufacturing sector. On the other hand, older people who had still been employed in the manufacturing sector years ago, may feel the need to 'return to their roots', thus a demand for industrial tourism can be detected in all age groups.

Mader (2003) collected evidence of rising demand of company visits in the German Ruhr area. His study is especially interesting, because the surveyed companies do not engage in any promotional activities to enhance their prominence and visitor numbers. Nevertheless, six of the seven companies that were surveyed showed an increasing number of tourists in the ten years preceding the survey (1993–2003). For example the Chemical Park Marl managed to increase its visitor number from 915 in the year 1999 to 2859 in the year 2002, whereby the park offers constantly six tours per week in summer and three tours per week in the winter period (Mader, 2003). As this example already suggests, the demand of industrial tourism depends very much on the period of the year and as well on the target group. Visits of professionals are usually concentrated in the months

¹ The visitors numbers have been collected from 1984–1993 and thus do not refer to the same year.

February until June and September until November, during the week. On the other hand, leisure visits rather take place during the school holiday period and at the weekend (Mader, 2003).

Visitors go to a city, not because of one tourist attraction, but because of the whole package that is offered. In line with this philosophy, Van der Borg et al. (1995) make a distinction between primary tourist products (museums, amusement parks, cathedrals, etc.) and secondary tourist products (hotels, restaurants, shops), emphasizing the need for a well integrated tourist product. Baumann (1999) showed in a survey among a number of companies, that 95 per cent of the industrial tourists combined their visit with other primary or secondary tourist attractions in the region, like a city tour, the visit of a theatre etc. This indicates that there could be also a demand for tour packages, involving more than one (industrial) tourism attraction in one tour. The idea behind this is that a city can be seen as a shopping mall in which customers look for various shops.

What makes industrial tourism attractive?

According to a survey that was carried out in 1992 in the UK, the main reason why people visit companies are (1) to see and experience the production process and (2) to buy goods (Frew, 2000). Mader (2003) suggests that the touristic potential of companies is mainly dependant on the kind of product that is produced. He suggests that especially consumer goods are interesting for visitors, while services and intermediate goods are relatively unattractive for the leisure tourist. Interestingly, Mader (2003) introduces a model that allows the classification of industrial tourism products. He introduces eight different categories:

- Goods with a symbolic character for the region: coal and energy for the German Ruhr area, the port and everything related to it for Rotterdam, cheese production for Gouda, bananas and coffee for Guatemala, and so on.
- Branded goods: for example cars, sports goods and beer.
- Consumer goods: for example lemonade, beer, chocolate, newspaper and toothpaste.
- Goods of everyday life: for example cars, expensive watches, diamonds and perfume.
- Luxury goods: for example cars, watches and jewellery.
- Technologically demanding goods: for example cars, computers, mobile phones and compact discs.
- Special interest goods: for example energy, water, television, public facilities, food and theatre (backstage).
- Demanding handicraft goods: for example glass, chinaware and blacksmith products.

According to Mader, these categories operate cumulatively: thus, a product has more touristic appeal (and can create more demand for company tours), if it belongs to several of these categories. Observing the list of categories above he notes that especially a car belong to a lot of the listed categories: it is a branded good, a luxury good, a key good of everyday life and it is a technologically demanding good. Moreover, big car factories also very often dominate a region and hence also reflect their characteristics. This could probably also be the reason why the car industry is a forerunner when it comes to company visits. The attractiveness of the product and hence the demand for company tours is so high, that car manufacturers were 'naturally driven' to develop company tours. The data from other authors (for example Gelbert, 1994) suggests that also the drink and food industry belongs to a segment that is highly attractive for visitors. A disproportional part of industrial tourism attractions worldwide comprises companies belonging to this category.

1 The supply of industrial tourism from a private- sector perspective

Benefits

By receiving visitors, companies may gain access to numerous benefit. A 1992 survey of company visits in the UK brought to light that the most important reasons why companies engage in industrial tourism are (1) to improve their image, (2) to improve the working morale and (3) to reap an extra income (Frew, 2000). These and other benefits will be discussed below.

First of all, industrial tourism can make a substantial contribution to the marketing of products and the enhancement of brands and company image. An increase in buyer loyalty, in sales and market share can be the consequence. Involvement theory suggests that consumers who have attended the production of a good become more brand loyal. This is due to the increased familiarity with the product, their first hand interaction with the employees and their first hand observation of quality assurance procedures. According to Mitchell and Orwig (2002) more and more brand managers are recognising the potential of industrial tourism to strengthen the bonds with (potential) customers, and increase brand loyalty. An illustrative example is the reaction of the director of Celestial Seasonings – an American tea producer – on the huge success of their plant tour: 'One visit has more value than one hundred commercials when guests relate their positive experiences to friends and family.' (Brumberg and Axelrod, 1995). In other words: industrial tourism offers plenty of possibilities to make visitors enthusiastic about the firm and its products, indirectly also reaching other stakeholders through word of mouth advertisement. Industrial tourism is an especially promising marketing instrument, as the target group that can be reached (leisure visitors and professionals) is typically highly educated, with a high share of people that hold an influential position of some kind. Even considering the costs involved in industrial tourism (like the salary of the guide), it can be a rather attractive marketing

instrument. One of the interviewees of Mader (2003) noted that the yearly salary of a guide costs only about as much as a double sided advertisement in the German magazine *Spiegel*. Industrial tourism can be also an interesting marketing instrument for companies that produce intermediate goods or services. For these kind of companies, industrial tourism can be an instrument to influence individuals in other companies (their business to business customers, their suppliers but also for example their sales agents and shareholders) and increase their loyalty. Groups of students are also an attractive target group for such companies. Students with an interest in the topic are very likely to work in a related area in the future; it is quite likely that at least some of the youngsters will choose to work for a supplier or customer of one's own company in the future. If these students hold a good opinion about one's enterprise, the probability that they will opt to purchase the company's products is high, once they reach a corporate position with decision power. But not only students and employees of potential business to business customers are relevant target groups. Every consumer in general could be relevant: companies that produce intermediary products can also showcase the contribution of their product or service to a consumer product. Indirectly, an intermediary company can thus benefit from the increasing demand for their intermediate product which is caused by a stimulation of sales of a consumer product that contains their inputs.

Secondly, industrial tourism can support the daily production process. Company tours potentially contribute to productivity gains because employees become proud of the firm they work for (following the positive attention of other people) which ultimately increases their working morale. According to Mitchell and Orwig (2002) everybody who interacts with a company (also buyers, suppliers, managers, employees, and so on) benefit from a close look on the production process; so productivity gains could also be achieved through better knowledge of the process and an the resulting improved co-ordination with customers and suppliers.

Thirdly, industrial tourism might create opportunities to generate turnover, for instance by means of selling regular products or souvenirs, or by catering. Direct income can also derive from the sale of entrance tickets. These benefits are particularly relevant if companies consider industrial tourism as a (commercial) profit centre. Moreover, industrial tourism can offer an opportunity to sell slightly damaged products – or products with a damaged packaging – on the spot (slightly damaged products usually occur in any production process). This can reduce waste disposal costs and can even generate extra income for the company (Henly, 1988).

Fourthly, industrial tourism responds to the need for corporate social responsibility and civic engagement. Company tours can be part of strategy that aims to secure the license to operate. By receiving visitors, companies can show how they treat their personnel, the environment and the communities in which they operate in general. This strategy is particularly interesting for companies that run the risk of negative publicity and reputation damage, like for example the chemical sector or the energy sector. Industrial tourism can be used as a way to build a relationship with the local residents – convincing them of the positive aspects

of their company and allaying fears. Company visits can also be an instrument against lay offs and to employ people further in bad economic times. Especially in regions that face a decline of traditional industries, industrial tourism can be used to shift people within a company from manufacturing jobs to jobs created through industrial tourism. This is one way how companies can show their corporate social responsibility.

Fifthly, industrial tourism can help to attract employees. Company tours help to make potential employees – notably students and scholars – interested in the production process, and positive about the company. Particularly when labour markets are tight company tours become an important instrument in the human resources strategy. Furthermore, investments in industrial tourism help to create an attractive city – in terms of facilities and image – and thus, an attractive place to live for the higher educated.

Sixthly, industrial tourism can be seen as a way to get in touch with the customer and to be close to the customer's wishes. Company visits can thus serve as a kind of market investigation instrument, a continuous process that feeds back information and allows for a quick adjustment to changing customer wishes. Especially for companies that are separated from their final customers through intermediaries, company tours are an instrument to get in direct contact with the customer.

Costs

The costs of industrial tourism cannot be seen in an isolated way. Of course, companies need to assess these costs with regard to the benefits that can be reached, in order to assess if industrial tourism makes sense for them. Most of the benefits mentioned above can be collected on the medium and long run only, which means that companies that only think about the short run will probably be very difficult to convince to open their doors for company tours. Thus, in the first place the mindset and attitude of an entrepreneur is of major importance for the potential to realise company tours. If an entrepreneur does not think about the medium and long run, industrial tourism is rather out of question. For companies that produce a business to business product, the marketing advantages of industrial tourism are generally less obvious. There are, however, several other possible reasons why these companies could have an interest in industrial tourism. The question is if companies are actually aware of these benefits.

Apart from a lack of awareness, most of the barriers of industrial tourism can be translated as the costs of industrial tourism: of course, it costs money to employ a guide or to create visitor facilities. Small companies might not be able to offer company visits on a regular basis, simply because of a scarceness of resources (Mader, 2003). If such companies are supposed to open their doors, they might need some assistance from the public sector in order to be able to organise company visits. But costs do not only refer to initial investments and running costs, they also refer to the potential risks that might occur. There are a number of constraints that can act as barriers for industrial tourism. Nevertheless, as we will see hereafter the

big majority of these constraints can be tackled relatively easily, provided that the companies show the will to do so.

Companies that are very active in industrial tourism frequently face limits of visitor capacity. In many cases, however, it is rather the unwillingness of the company – and not this capacity limit – that restricts the number of visitors. The number of visitors that is admitted within a specific timeframe and in certain areas can often be increased, for example by professionalising the tours or by finding innovative ways to allow for a higher carrying capacity. But obviously, there will be a maximum number of visitors that can tour a company during a defined timeframe, and companies need to ensure not to exceed this limit. If this restriction is violated, the company may encounter negative consequences, such as a delay of the production process, which ultimately means additional costs for the company. Moreover, some departments of certain companies need to be off limits for visitors, simply because the presence of visitors would disturb the production process (for example in a paint shop or in a laboratory) or because it is dangerous for visitors to be there. But even in such cases innovative solutions can be found, like for example a glass tunnel that runs through a laboratory.

Industrial tourism may also open the door for theft and industrial spying. In practice, however, theft from visitors is not a major concern of companies and also the risk of spying can be easily reduced, simply by keeping sensitive areas of companies (like laboratories or research departments) closed from spectators, or by suspending tours of certain areas during sensitive periods, like during the introduction of a new model. Furthermore, the employees themselves can be opponents of guided tours in their company; sometimes, employees may feel uneasy when visitors are around and watch them, which can have negative consequences on the production. However, in most cases companies report exactly the opposite – namely that their employees feel more motivated and proud of their work – because of the visitors.

Another difficulty associated with company tours, is the often very seasonal character of tourism. This is not so much of a problem if the tours are only offered every now and then when somebody asks for it. But this may become a challenge, when company visits are offered on a regular basis. What to do with the guides that are not needed any more in the off season? We can preliminary reckon that there are two main ways to deal with this: on the one hand, companies can employ guides only on a flexible basis, or they can – as Mader (2003) suggests – dip into the pool of their already retired employees as tour guides; the latter could be a rather cheap and flexible way to organise company visits. If a company chooses for a permanent employment of guides, the company might have to act more proactively and try to approach schools and other organisations especially in the low season of industrial tourism. They could for example align their visits more to the educational programmes of universities. Other challenges for companies are the availability of sufficiently big parking areas, sanitary facilities and a kind of front room where they can receive the visitors (Frew, 2000). However, all of these

challenges can be solved if the company tackles them in a proactive, anticipatory and professional way.

Mader (2003) also mentions another reason that could act as a barrier for industrial tourism: for some companies opening their production process to the public could be counterproductive for their desired image. For example a company that is producing sausages may not want to display all of its activities to the public, as people might feel disgust of the product after having observed all the steps of the production process. Another reason not to open one's company could be that the product lacks acceptance in wide parts of society. This could for example concern producers of mink coats or cigarettes. And indeed, the cigarette factory R.J. Reynolds decided to stop its (very popular) tours because of rising anti smoking sentiments in the US (Mitchell and Orwig, 2002). On the other hand one could argue that a negative image of one's product can be an extremely good reason to start offering a company tour; in order to show that everything is done according to regulations and to correct wrong perceptions. According to Frew (2000), companies also may choose deliberately not to open their doors, simply because they think that there is nothing interesting to see. An example are factories where the whole production process occurs within machines that are completely closed towards the outside. Nevertheless, such kind of companies could still be interesting for professional visitors.

Obviously, not all companies manage to deal with the challenges mentioned in this section in an adequate way. Though the entire number of companies that organise company tours is increasing, in the 1990s some companies in the United States actually decided to reduce or stop their company tours, and to shift the focus on – easier to manage – company museums instead. Also in France some industrial attractions had to close, due to an external decision: a national security plan (Vigipirate) has for example put an end to tours of nuclear plants. The disadvantage of replacing company tours by company museums is that visitors cannot experience real work any more. According to Frew (2000) this is a serious threat for the attractiveness of the visits, as authenticity is lost. A less attractive visit may also mean that many of the benefits of industrial tourism cannot be fully reaped any more.

2 Company visits from a public sector perspective

On the one hand cities can act as a facilitator, encouraging private companies to open their doors for visitors. Secondly, cities can also be owners of companies (municipal enterprises) themselves and can influence the supply of industrial tourism directly (for example tours of public companies, tours of the city hall and so on). In this book, however, we focus on the first role. The question is: should cities have an explicit strategy for industrial tourism and should they encourage companies to open their doors for visitors? What are the benefits for cities, in terms of income and image?

Income effects

The direct effects of tourism can be measured by the share of tourism in regional income: if an increase of this share can be observed, the city has benefited from tourist activities. However, also multiplier effects have to be taken into account, to be able to grasp the full benefits for a city or region (Williams and Shaw, 1992). It is very difficult to determine the extent of these multiplier effects, but just to give a hint about their possible dimension we want to mention that Archer (1977) had calculated that the tourism income multiplier is between 1.68 and 1.78 for the UK. Williams and Shaw (1992) point out that multiplier effects are greatest in large tourist economies and in specialised tourist economies, because these economies are more able to support linked specialised services. For second cities without a strong tourism economy, this indicates that it could be beneficial for the city to promote industrial tourism as a spearhead policy, rather than as an insignificant niche. Specialisation could lead to the emergence of locally specialised services (like for example industrial tourism consulting or tour agencies specialised on industrial tourism), which could develop a reach far beyond the region in question.

As we already touched upon above, tourism as such is commonly regarded as one of the economic sectors which has realistic potential for growth beyond the short term; due to rising incomes and more free time, the future potential of tourism is considered to be high (Williams and Shaw, 1992); moreover, the potential of urban tourism in particular is very high.

Baumann (1999) indicates that industrial tourism is especially interesting for cities, considering that it is a form of tourism that aims to exploit existing attractions to the full: it does not use up additional space in a city. The use of existing attractions is also related to another advantage of industrial tourism: it can potentially be implemented within a rather short time frame, probably even more quickly than other kinds of tourism. Williams and Shaw (1992) note that tourism as such can be developed in a rather short time-span, and that relatively moderate levels of investment can lead to rapid impacts on the regional economy.

In terms of employment the tourism sector holds a lot of potential, especially for traditional industrial cities that very often suffer from a rather low educated population and a lot of people living on social benefits. Direct employment in tourism (bars, hotels, restaurants and so on.) consists mainly of unskilled employment, which provides a possibility to employ a bigger part of the unskilled part of a city's population; this may in the end alleviate social problems in industrial cities. But tourism as such can indirectly also create higher skilled employment, for example in supply industries and producer services. In the special case of industrial tourism, we can expect that a higher proportion of skilled jobs may be created, as for example especially professional company guides and marketing and communication experts are needed for industrial tourism.

Image effects

As we wrote in our introduction visits to factories have been taking place for quite a long time. Nevertheless, the involvement of the public sector as a driving force behind industrial tourism, and the idea that industrial tourism can help to change the image of a place, is a rather new phenomenon. Industrial activities have had a very negative connotation in the past, and cities that accommodated a lot of these activities were generally considered to be dull and dirty places. However, things have changed a lot in Europe over the past few decades: polluting industries have either moved away to cheaper locations abroad, or have been forced by stricter environmental rules to cut back on emissions. Though things have improved a lot in industrial cities, the image of these places still suffers from the past. Changing an image is a long term process and cannot be done overnight. Cities should not have too many illusions about this process: it will be highly difficult to change the image of a city from a dull industrial place to a second Paris. The past always sticks to a city to a certain extent, and rather than denying it, one can try to turn a prevalent negative image into a strength. Industry is not only associated with pollution, it is also associated with economic strength and prosperity. Cities are the powerhouses of the economy, and a city that is known for industry should not hide its companies, but rather show them with pride to the public. Even highly successful tourist cities, such as Munich and Amsterdam, want to be associated with industry nowadays and have recently launched programs on industrial tourism. So why should traditional industrial cities deny their character, and miss a great opportunity?

The reason why cities are still hesitant to use their industries as an asset in image building and tourism is well known. Schmidt (1988) emphasises that the direct link between industry and tourism is a rather new phenomenon, as these two terms have been rather seen as a contrast in the past. Industry was typically associated with pollution, noise, hecticness, work, and greyness. On the other hand tourism evoked rather different connotations, such as intact environment, quietness, relaxation, free time and so on. These images do of course not correspond to reality anymore: both industrial activities and the tourism behaviour of people have changed quite a bit. City trips are becoming more and more important, and it is not quietness and relaxation that tourists seek when visiting cities: rather the opposite, they want to be at the places where things are happening.

If promoted in a clever way, industrial activity and vibrant cities can go hand in hand in the perception of visitors. Not so many regions are endowed with a substantial number of industrial attractions open to public; a tourism strategy that puts industrial tourism in the centre – rather than on the side – may help a region to reach a competitive advantage over other regions. As Mader (2003) indicates, this could be an especially interesting strategy for regions that do not have yet a characteristic tourism profile and that lack other tourist attractions.

A high local and regional demand for industrial tourism is important, if we consider the fact that a critical mass of people is needed to strengthen or change

the image of a place, whereby residents of the area play a key role in this process. Industrial tourism can help to boost the pride of residents about their city and can help to change outdated and wrong images. Local people are ambassadors for their cities and if the residents have a positive picture of their city, this is the best way towards strengthening or changing the image of a place.

3 Converging interests?

As we discussed in the previous section both cities and companies have a potential interest to be engaged in industrial tourism. Now the question is under which conditions these interests converge: how can industrial tourism be beneficial for both sides at the same time?

We have seen that industrial tourism attractions can be developed within a relatively short timeframe and that moderate levels of investments can lead to rapid impacts on the regional economy. This could mean that cities can reap the benefits of industrial tourism activities in the rather short run. In this sense, cities do not even have to be aware of long term benefits to be able to grasp some of the benefits of industrial tourism. In contrary, we expect that most companies need to have a long term vision in order to be engaged in industrial tourism. Nevertheless, we expect that also cities can achieve extra benefits if they have a long term view of industrial tourism; such a situation would lead to converging interests with companies and could provide a lot of additional opportunities.

Another crucial question is whether the tourist industry is able to utilise local resources. Several scholars view this as a condition in order to be able to reap the benefits of tourism to the full. The more local capital, labour and food supplies are utilised for (industrial) tourism, the better for the local economy (Williams and Shaw, 1992). In this sense, industrial tourism might have a significant advantage over 'conventional' tourism: visitors get in contact with the products of local companies, and if you can encourage them to consume the local products they have experienced during an industrial tourism visit, this will be also good for the local economy in the end. Moreover, this could mean that industrial tourism in locally owned and controlled companies might be more beneficial for cities (from an income-dominated point of view), when compared to industrial tourism in international companies or foreign companies that have a plant/subsidiary in the city. In the latter case, the full benefit of industrial tourism might not be remained in the region, but could be partially transferred to the place where the headquarters or most of the shareholders of are located. Nevertheless, if we take into account image aspects as well, there is more convergence of interest between the city and multinational corporations that have their headquarters elsewhere. We assume that the image of a city can benefit greatly from a greater visibility of well known multinational companies (for example, through industrial tourism). And vice versa these companies may as well have an interest in a positive image of the city; a

good image is crucial to attract the creative class to a place and to recruit the best brains.

The choice of target groups may be the key issue to reach a situation in which the interests of companies and cities are converging. If we consider image effects, we can expect that a city will welcome all kind of visitors, as a critical mass of visitors is needed to change or strengthen the image of a city. If cities take a long-term view in this respect and do not hastily rule out any visitor category, cities and companies may indeed have converging interests concerning their target groups. However, if both actors tend to take a rather short term (income oriented) view, companies might be inclined to prefer local target groups (for example, to influence their consumer behaviour, or to attract potential employees), while the international visitor could be very attractive for the city economy. According to Williams and Shaw (1992) foreign visitors usually spend much more money per capita, when compared with domestic tourists. Of course, this has to do with the fact that domestic visitors usually don't need to pay for accommodation – for example because they live nearby or they spend the night at a friend's place. Foreign visitors usually spend more time in a place, which is also why they spend more money (as indicated, accommodation is crucial in this respect). However, this view is very much oriented towards short term income and hence misleading. Image effects must have a central position in the perception of cities and companies – a view that is oriented on short term profit only can undermine the understanding of converging interests of public and private in the realm of industrial tourism.

Nevertheless, income is, as we have seen, also a key goal of industrial tourism, and is a crucial determinant for the convergence of interests from public and private. By this we mean that for the city, positive image effects alone might not be enough: for a city it might be beneficial to attract some of the cash cow visitors (for example international visitors and overnight stayers) as well, in order to achieve a higher income. We assume that the situation is similar for companies, with the difference that the emphasis of companies will be more on long term benefits (unless a company operates an adjacent shop where its products or souvenirs can be purchased). The problem is that every visitor group delivers different kinds of benefits to cities and to enterprises. Hence, we assume that cities and companies need to engage in a negotiation process in order to agree on those target groups that bring most benefits in terms of income and image to both sides.

It may depend as well on the availability of investment to develop the necessary infrastructure (hotels, attractions, and so on) if a city economy can reap the benefits of (industrial) tourism to the full, and hence if a city's interest in industrial tourism is converging with the interests of companies. Industrial tourism as such is a great opportunity for cities, but cities need to take into account a wide array of additional conditions. Cities need to hold the ability to supply the needs of tourists, whether for food, souvenirs or hotel beds (based on Williams and Shaw, 1992). This means that cities cannot focus on the narrow field of industrial tourism alone, if they want to reap the full benefit in terms of income (and image).

To give an illustrative example of the integrated character of industrial tourism, we focus on the importance of hotel capacity here. As Williams and Shaw (1992) note, it is important to pay special attention to the accommodation sector, because it is accommodation – more than any other component – which has a major influence on the types of tourists attracted, the duration of their visits and the types and the quantities of jobs and income that will be created in the region (Williams and Shaw, 1992). If a city tries to develop a specific tourism niche, geared at specific target groups, it should make sure that there is sufficient hotel capacity in place, in a category that fits the needs of the target group. Students, for example, will rather show a preference for low cost accommodation, such as youth hostels or hotels of the lower categories. If these people are interested in the attractions a city has to offer, but cannot find accommodation that fits their needs, they will either choose not to visit the city, or they will opt to spend the night in a nearby place that does offer a sufficient supply of hotels in the required category. What does this mean? Well, on the one hand this means that cities need to be well aware of their free capacities in terms of hotels, and especially which category is suitable for which target group. It might be necessary for a city to stimulate the expansion of hotel capacities (of specific categories), always keeping in mind the preferences of the target group that is aimed for.

In this relation, one should be aware of the difference between excursionists and tourists (see Van der Borg, 1991). Tourists are defined as overnight stayers, whereas excursionists are visitors that visit a place, but spend the night elsewhere. If there are too many excursionists in a place and too little overnight stayers, this might be harmful for a city. Excursionists spend less money than overnight stayers, but also create costs for the city (for example congestion costs and the recycling cost of the waste they leave behind). Thus, cities need to reach a balance between these two groups, whereby a higher share of overnight stayers is more beneficial for them in terms of income. For a company it might not matter much if a visitor spends the night in the city or if the visitor comes as an excursionist; what seems to be important for companies is that the tourist pays a visit to their company and leaves with a positive impression. However, one could argue that spending the night in a city increases the probability that tourists visit more than one company, just because they have more time available in the place. Hence, companies and cities may have converging interests in this issue as well. The concept of excursionists and tourists does not mean that excursionists are per se bad; on the contrary, also this group can be very beneficial for cities. Nevertheless, cities have to aim at a healthy balance between excursionists and overnight stayers.

4 Our frame of analysis

In this book we define industrial tourism as visits to operational firms of people who are interested in the firm, its products, the production processes and/or the way a company is managed. We acknowledge that the term industrial tourism is a bit

misleading because it not only involves visits to industrial firms, but to companies in other sectors as well. Also visits to publicly-owned companies are object of study, although we have to realise that their motives differ from the motives of privately-owned firms. Furthermore we emphasise that industrial tourism not only comprehends visits by (leisure) tourists, but by other customer groups as well. We can distinguish the following target groups:

- Leisure tourists. Industrial tourism could be particularly interesting for more experienced tourists who have seen many cities in the world, and who are now looking for truly unique experiences. Company visits provide an opportunity to see how a city is actually functioning, reflecting the identity (or personality) of a city.
- Students. For students, industrial tourism provides opportunities to learn more about production processes, while getting to know potential future employers.
- Professionals. This category includes suppliers, (business to business) customers, competitors, financiers and other stakeholders of a company. Suppliers, customers and financiers may want to learn more about the firm they cooperate with, while competitors and other firms are usually interested in innovations or the concept of industrial tourism as such. Moreover, also visitors of trade fairs and congresses belong to this group. The segment of 'incentive travels' also forms part of professional visitors.
- Journalists and researchers. Their motives are comparable with the motives of competing firms: they want to learn more about innovations, either in the core business or about the company visits themselves.

The aim of this research is to shed light on the following question: 'Under what circumstances can industrial tourism make a strategic contribution to the competitiveness of city and enterprise?' Based on this deliberation, we construct a frame of analysis in this section, which will be applied to the case studies. We need such a frame to analyse different forms of industrial tourism in a systematic way. With the help of the literature review above, we could identify four important issues that need to be taken into account for securing the support of both city and enterprise, and ultimately for making industrial tourism work in practice: (1) adequate target group selection; (2) attractiveness of the industrial tourism product; (3) benefits in terms of income and image for city and enterprise; and (4) the organisational form.

Adequate target group selection

The scope and scale of the target group are strongly related to the attractiveness (and accessibility) of the product. The scope concerns the characteristics of the target group: notably their age (for example children, young adults or older people), their travel motives (for example leisure, business or education), and also their

educational level, income level, sex, civil state, and so on could be relevant. In this relation also the distinction between excursionists and tourists (Van der Borg, 1991) is crucial. With the scale of the target group we refer to the geographical size of the target group, for instance making a distinction between local, national and international visitor attractions. Some industrial tourism products might be interesting for a very small niche market only, while other products have the potential to attract mass tourism. We already elaborated on this first condition in section three. The attractiveness of an industrial tourism product is a subjective notion and strongly depends on the preferences of the target group.

Attractiveness of the industrial tourism product

Taking a look at the theory we expect that for some firms it is easier to attract visitors than for other firms, simply because their products (or processes) are more appealing. Examples of such products are cars, motorbikes, chocolate, wine, and movies. Product characteristics are particularly relevant for leisure-oriented visitors who want to taste and/or touch consumer products. What also matters in our view is the attractiveness of a production process. An example of a factor that plays a role in this respect is the degree of innovation: highly innovative production processes might attract another (though not necessarily smaller) target group than more traditional methods of production. The characteristics of the production process have a strong influence on the demand from students, professionals, journalists, and researchers.

Besides the quality of the product, also the quality of the visitor services should be taken into account. The demand and attractiveness for an industrial tourism product can be enhanced by providing special visitor facilities, such as (interactive) information panels, (professional) guides, opportunities to feel, taste or touch the product (or inputs), presentation facilities, catering facilities, and so on. The required visitor facilities and their quality level strongly depend on the target groups to be attracted.

The issue of accessibility is also highly important for the attractiveness of a product. On the one hand this refers to the ease of reaching a destination, on the other hand accessibility can also refer to the availability of other primary/secondary tourism products nearby. The attractiveness of a good/company might be increased if other attractions are located nearby, which makes it more attractive to travel to a location that is not so accessible. This could mean that rather remote companies should seek ways to team up with nearby tourism attractions, as visitors can combine several experiences in one trip. This calls for an integrated approach of tourism. For cities, the challenge is to create packages that reflect their image and/or identity, and that respond to the needs of customer groups. Packages have to be attractive and accessible, just like the individual products.

Also the accessibility on the production site is a relevant factor, with the disabled as a target group that deserves special attention. Accessibility can however also be interpreted in terms of legibility – the ease with which visitors are able to find a

location – which requires adequate communication and information provision (in the city and on the internet). In this respect signposting plays an important role: standard road signage can be beneficial.

Benefits in terms of income and image for city an enterprise

To reach converging interests of the public and private side, one needs to ensure that the benefits outweigh the costs for both parties. With benefits we refer to increases in income and in image, costs refer to the initial investments that have to be made, and potential risks that might occur. Industrial tourism can make a strategic contribution to the competitiveness of city and enterprise if the product responds to the demand of particular target groups, and if city and companies can agree on a number of common target groups.

As a first condition, a tourism product is needed that benefits the city in terms of income and image. In this respect several aspects have to be taken into account. Highly populated areas could be very fertile places for industrial tourism, because they offer a sufficiently big critical mass of companies that can ensure the supply of industrial tourism. Industrial tourism is a rather new concept, and thus not so many regions have adopted an industrial tourism strategy yet; such a strategy may help a region to reach a competitive advantage over other regions. Cities may exploit the benefits to the full if they hold the ability to supply the needs of tourists, whether for food, souvenirs or hotel beds. Especially accommodation is crucial in this context because it has a major influence on the type of tourists you attract and on the length of their stay. In this respect, cities could try to increase the share of tourists that spend the night in their city, as this category of visitors generally spend more money during their stay. Especially international visitors are an attractive target group for cities, as they spend – on average – more money than domestic visitors, thus generating more benefits for the city. However, also local tourists and excursionists are beneficial for cities, as these groups can help to turn around the image of the city. Improving the image of a city is a big task, and the more people you can reach, the quicker it can be accomplished.

As we already mentioned in section four, companies can achieve several benefits by being engaged in industrial tourism. Industrial tourism can be used as a marketing tool for their products (both for consumer products and intermediate products) and may present a way to be closer to the customer's needs. Opening the company's doors to visitors is also a way to show that corporate social responsibility is taken seriously. Moreover, company tours can help to build pride among employees and this way support the daily production process. It can also generate income (from the sale of tickets and souvenirs) and it can help to attract employees.

Organisational setup

During the literature review it became clear to us, that most recommendations concerning organisational aspects concentrate on companies. ‘How can companies organise industrial tourism?’ is the main question that is dealt with in this respect in the literature. This is mainly about organising industrial tourism in a way to overcome encountered barriers, and to avoid negative effects that could occur due to company visits. The organisational framework needs to ensure that a product meets safety, security and other basic requirements. If the actors are aware of these issues, it is usually very easy to find innovative ways to tackle them. Every company will face a certain capacity limit: a maximum number of visitors that can tour a company during a defined timeframe under the present conditions. In many cases these limits can be increased by setting relatively easy measures. However, very often it is rather the unwillingness of the company – and not these barriers – that restricts the number of visitors. Moreover, companies need to be aware of the seasonality of tourism and the problems that might come along with this if not properly managed – again, these problems can be solved by employing some anticipatory thinking. We acknowledge the importance of these kind of organisational aspects in companies, but our view on industrial tourism is somewhat broader in this respect, and includes organisational issues in the city and the major actors in the city as well. We suggest that industrial tourism can be strengthened, if a city is able to create a conducive organisational environment for companies.

To conclude

The literature on industrial tourism suggests that there has been a growing demand in industrial tourism over the past decades, and predictions proceed on the assumption that this development will continue. More and more companies open their doors for visitors, and with a certain time lag, also cities have realised the benefits they can reap from well organised company visits. The main drivers for cities and companies are improvements in image and income. In this sense, we can observe converging interests between companies and cities. For companies, a city with a strong economic image is very positive; and also for the cities it is highly beneficial if they harbour an array of companies that make use of industrial tourism to boost their image and income. Industrial tourism can be a true win-win situation: if it is organised in a professional way, if the quality and attractiveness of the company tours is assured, and if cities and companies can agree on those target groups that bring most benefits to both sides.

In the next chapters we will apply this research framework to the case studies. Each case study has a similar structure: after an introduction (the first section), the second section addresses the general profile and the tourism profile of the examined city and its region. In section three we analyse the organisational framework for

industrial tourism in the selected city/region, followed by an overview of industrial tourism products in section four. These observations will be confronted with the frame of analysis (the four conditions that we described above) in Section five.

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