MARKET ANALYSIS

ON THE CURRENT ASSETS AND FUTURE POTENTIAL OF LITERARY TOURISM IN THE NORTHERN PERIPHERY AREA, TO DEVELOP AND GROW THROUGH NEW AND EXPANDED MARKETS IN THE NPA REGION, THE EU AND GLOBALLY

COMMISSIONED BY
IRISH CENTRAL BORDER AREA NETWORK (ICBAN) LTD AND THE WESTERN DEVELOPMENT COMMISSION

PREPARED BY
KARAN THOMPSON CONSULTING LIMITED
31 GRANVILLE ROAD, CABINTEELY, DUBLIN 18, A96 AY28, IRELAND

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1. EXECUTIVE SUMMARY

During December 2017 Karan Thompson Consulting Limited (KTCL) was commissioned by the Irish Central Border Area Network Ltd. (ICBAN) and Western Development Commission to undertake research and market analysis on the current assets and future potential of literary tourism (literary tourism) in the Northern Periphery and Arctic Area (NPA). The aim of the research, to inform the development of a project application to the NPA Programme to support the development and growth of literary tourism through new and expanded markets in the NPA area and beyond.

The Northern Periphery and Arctic area is home to a range of models of excellence in literary tourism. It incorporates two UNESCO Cities of Literature in Edinburgh, Scotland and Reykjavik, Iceland and is home to multiple literary icons and Nobel Laureates across multiple NPA country profiles. The borderland regions of Ireland and Northern Ireland have strong literary tourism (literary tourism) assets, linked by people and place and spanning both urban and peripheral areas. Against the backdrop of the existing capabilities at national level the project partners have identified the potential for the development of a conceptually integrated literary tourism offer for the NPA area, one which will have a positive impact on entrepreneurship and the wider tourism economy across the relevant NPA country profiles.

This paper presents information NPA country profiles to capitalise on existing core strengths in place-based literary tourism by establishing a baseline for relevance and need to sustain future development in the literary tourism sector and a rationale for why transnational cooperation is needed for such development. The market analysis;

- provides a baseline of literary tourism as it currently exists across the NPA country profiles and through best practice case studies of literary tourism both within and outside of the NPA area itself,
- analyses commonalities which exist across the region and gaps in literary tourism infrastructure,
- highlights areas where potential for a bespoke and coordinated literary tourism proposition exists and the appropriateness of interventions in relation to existing tourism development strategies in partner countries,
- assesses opportunities for learning transfer in literary tourism from cities and urban areas to the rural periphery, addressing issues which related to indigenous expressions of culture and language across the region,
- looks at successful models of intervention, ways in which country profiles have coordinated their efforts in literary tourism, between agencies and SMEs, towards the development of successful literary tourism ecosystems
- identifies similarities in thematic responses and the development of immersive and experiential literary tourism products and services
- finally, it looks at models of digital innovation in literary tourism where the adoption of new technologies delivers greater awareness and visitor appeal in spite of their peripheral locations
2. PROJECT CONCEPT

The NPA Region is home to world-class literary icons and landscapes. Current low levels of joined-up Literary Tourism activity in the NPA make it a sector that is ripe for development. This project addresses the need for shared development and marketing of existing assets and the development of new ones, which respond to emerging literary and cultural consumer needs, and will result in a conceptually integrated cultural tourism product to deliver greater economic impact than projects developed in national isolation.

It is intended that the project will address the untapped potential of the strong and complementary place-based literary-landscape assets of the lead partner region (in the first instance) with more effective promotion and development of these assets and sharing learning across the partner countries to increase viability of the literary tourism sector. The key outcomes of the project are outlined below with the ultimate aim being the coherence and development of a new cultural tourism product for peripheral regions of the NPA delivered in association with local SMEs.

- The development of a shared concept for Literary Tourism in the NPA
- Research to understand and appreciate market size and profile
- Development of transnational good practice in the wider NPA through sharing of complementary skills, knowledge and expertise
- Transfer of knowledge from cities to rural periphery
- Development of shared narrative which promotes destination-based literary tourism in the region
- Innovation-based strategies to tackle market development and the ability of SMEs to cluster and capitalise on literary tourism opportunities and potential
- Joint marketing approaches for destination-based marketing
- SME/micro enterprise engagement to deliver tangible benefits to both the literary tourism and wider cultural tourism sectors in the NPA region

3. METHODOLOGY

The methodology adopted for this research involved intensive desk research of secondary sources combined with a primary source information as available from contacts within the NPA area and beyond, enabling a detailed level of investigation, collection, assimilation and analysis of inputs. These include:

- Existing documentation relating to literary and cultural tourism within the NPA and beyond
- Analysis of place-based strategies for tourism development in the NPA region
- Extant literary tourism initiatives nationally and across the NPA region
- Market-readiness of the literary tourism development potential across the region
- Online resources and strategies for literary tourism across the NPA
- Comparative international models of best practice in literary tourism and cultural tourism in peripheral areas.
This process has enabled us to deliver a baseline SWOT analysis for literary tourism across the NPA area which:

- identifies the literary tourism product currently available in relevant NPA country profiles
- identifies the literary tourism development potential, relevance, market-readiness and maturity of market by location
- identifies core market segments for literary tourism in each location
- scopes market scale and evidence of motivated cultural tourism and literary tourism where available
- identifies opportunities for shared learning in literary tourism best practice
- investigates the involvement of SMEs in delivery of literary tourism initiatives programmes etc across NPA region
- Investigates the penetration of literary tourism from cities to peripheral areas
- Identifies location-specific literary tourism initiatives and the potential for shared learning and synergy in approach to modelling for immersive literary tourism development across NPA literary tourism country profiles.
4. **Northern Periphery and Arctic Area Programme**

The Northern Periphery and Arctic 2014-2020 Programme (NPA) is cooperation between nine programme partner countries: the Member States of Finland, Ireland, Sweden and the United Kingdom (Scotland and Northern Ireland), the Faroe Islands, Iceland, Greenland and Norway.

The country profiles in the programme area share a number of common features, such as low population density, low accessibility, low economic diversity, abundant natural resources, and high impact of climate change. The NPA programme supports the development of projects which aim to overcome the joint challenges evidenced in the programme area towards the development of opportunities that can best be realised by transnational cooperation.

The Vision of the NPA programme is:

> The Northern Periphery and Arctic 2014-2020 Programme aims to expand the regions' horizons, building on concrete outcomes and enabling the programme area to be a 1st class region to live, study, work, visit and invest. It is the programme's vision is to help to generate vibrant, competitive and sustainable communities, by harnessing innovation, expanding the capacity for entrepreneurship and seizing the unique growth initiatives and opportunities of the Northern and Arctic regions in a resource efficient way.

The Northern Periphery and Arctic 2014-2020 Programme is part of the INTERREG framework of the cohesion policy, supported by the European Regional Development Fund. The programme operates in a multi-layered policy landscape, making it well positioned to contribute to and align with the Europe 2020 Strategy, national and regional policies and development strategies, macro regional and sea basin strategies, and other programmes covering parts of the geographical area. In addition, increased interest and rapid developments in Arctic regions have resulted in a more explicit recognition of the programme's Arctic dimension in regional development.

Four priority axes underpin the NPA programme vision and have been developed with reference to the needs and potential of the programme area together with its policy and historical context and with the sparsely populated communities as the focus for all priority axes. The priority axes are:

1. **Using Innovation to Maintain And Develop Robust And Competitive Communities**
2. **Promoting Entrepreneurship to Realise the Potential of the Programme Area’s Competitive Advantage**
3. **Fostering Energy-Secure Communities through Promotion of Renewable Energy and Energy Efficiency**
4. **Protecting, Promoting and Developing Cultural and Natural Heritage**
Literary tourism is most often associated with place – whether celebrated for literary connections – sites of birthplaces, homes, places of inspiration for specific writers, playwrights, poets; or depictions of evocative topographies, landscapes and places references in literary texts, settings for novels etc. Literary tourists are often attracted to a destination as a response to the literature, choosing to visit a location by being inspired by a text which has transformed them from reader to tourist. There are two categories of tourists who visit literary places: (a) those who are motivated by the literature itself, who seek enrichment by visiting literary places and (b) the incidental visitor for whom the literary aspect is just one element of their experience.1

‘So-called literary tourists can simply be well-educated holidaymakers who are seeking an authentic experience, may have heard about the place’s linkage with a writer although they may not have high levels of knowledge about the actual work of the writer’; 2

Literary tourism is considered a niche sector within the wider cultural tourism sector. In more recent times the literary tourism sector has spilled over to include linkages with creative tourism e.g. film (J.K. Rowling’s Harry Potter – Scotland/Northern Ireland; Dan Brown’s Da Vinci Code – Rome), architecture (Knut Hamsun - Hamsun Centre, Norway visited for architectural appeal as well as its association with the author) or mythology and oral traditions transcribed to literature (e.g. Louth Derravarragh – Children of Lir etc). It is considered that places associated with authors are more likely to endure as these are kept alive by the writer’s work.3

Places associated with literature and specifically authors have grown in popularity with Dublin and Edinburgh, both UNESCO Cities of Literature drawing on their former literary greats to develop a new narrative to contemporary literature and literary tourism. Such places have constancy as cultural and literary tourism destinations and prove to be valuable assets to rural communities in particular (e.g. Hamarøy, Norway – Knut Hamsun; Drumcliffe, Sligo – W.B. Yeats). Literary places create reference points for the literary/cultural visitor, evoking emotional responses, memories and meaning for the location. They can be tourist attractions in and of themselves or form part of a wider literary, trail, region or tourism offer.

Literary Trails have been developed in many locations with many instances located in cities referencing places where authors, poets have lived or related elements within their works – one notable and internationally recognised trail is the ‘Bloomsday Trail’ in Dublin – following the footsteps of Leopold Bloom, the protagonist in James Joyce’s Ulysses. Such trails generally take the form of walking trails and can be guided or self-guided with a number of trails being developed via downloadable apps, GPS references, virtual and augmented reality experiences for hand-held devices and mobile phones. Significant examples include the new Stars and Stories walking trail promoted by Edinburgh UNESCO City of Literature which offers an illuminated literary trail around the Canongate area of the city. A virtual literary map is available from the cityofliterature.com website and additional media platforms (Twitter)

2 Ibid
3 Ousby, I Literary Britain and Ireland. 1990. UK.
entice visitors to upload content to drive additional awareness of and connectivity with the trail. #wordsonthestreet

**Literary Festivals** have also grown in appeal and have expanded over time to deliver experiences beyond the literature which promoted its original creation. These experiences tend to be linked to the arts and contemporary culture of the location. Exemplars in the NPA region include the Bram Stoker Festival, Bloomsday and Cúirt International Literature Festival, Ireland; Burns Night, Scotland; Happy Days Beckett Festival, Northern Ireland, and the Ibsen International Festival, Norway. Literary festivals are not confined to cities either, with their appeal providing a call to action for both the literary-motivated and cultural visitor to choose a location at a particular point in the calendar year. Festivals amplify the literary, artistic and cultural profile of destinations whilst helping to regenerate these regions. The potential for increased literary tourism from such festivals requires additional work to ensure their impact can be felt beyond the timeframe of the festival itself and into the wider tourism season locally, regionally and across country profiles.

365 Literary tourism impact delivered by SMEs. Literary tourism assets are often developed to support a literary or cultural festival and this is true certainly of literary festivals located in cities where literary events and themed products are promoted during the festival timeframe. However, there is evidence of many successful micro enterprises which offer small-scale literary-related tourism offers (tours, events, workshops etc) that provide these products and services outside of a festival time period. This is particularly evident when their product/service is associated with a literary place, places described in literary texts or for those interested in contemporary writing.

Another approach to year-round literary tourism is to be found in the international Book Town movement. Evidence of successful tourism and economic development has been found in a number of instances where rural locations have moved from an event model to a year-round offer, emerging as centres for specialist bookshops, dedicated literary festivals and connected cultural agendas.

> ‘Some dedicated bookshops have increased their business by focusing on specific literature genres to meet the requirements of visitors seeking quality literary publications or titles relating to the destination they are visiting’.

One such successful Book Town model is located in Wigtown – Dumfries and Galloway, Scotland in the NPA partner region. Wigtown has through this model and the Wigtown Book Festival enabled a regeneration of its rural location through a cultural agenda.

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6. **Global Tourism Trends**

The Organisation for Economic Co-operation and Development (OECD) recently published its inaugural Tourism Trends and Policies document. The report identifies key tourism trends and policies from insights received from over 50 partner countries. Tourism continues to be a major contributor to national economies and provides job-rich growth and employment opportunities across a range of skills and age levels, with international arrivals showing continued growth with anticipated growth to continue up to 2030.

Specific tourism trends and policies which bear relevance for the development of a literary tourism initiative in the NPA are outlined below:

<table>
<thead>
<tr>
<th>OECD Tourism Trend /Policy</th>
<th>Relevance to the NPA Literary Tourism Project</th>
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<tbody>
<tr>
<td>1 The OECD has evidenced a need for governments to ensure policy and delivery structures be put in place to maintain growth and benefits from the tourism sector including; the position of tourism within the government portfolios – e.g. dedicated ministry and inclusion of the tourism agenda across other government policy frameworks.</td>
<td>This is a requirement across the NPA region where co-ordinated tourism policies and agendas for the promotion of a region to international tourists in particular – as in the case of Visit Scotland / Creative Scotland and Tourism Ireland / Culture Ireland has evidenced strong growth in cultural tourism as a result of their efforts. A connected and co-ordinated interagency approach at national level in NPA country profiles which has an embedded cultural agenda would assist the development of literary tourism in that location.</td>
</tr>
<tr>
<td>2 It outlines the need for destinations to be made more distinctive to capitalise on market trends by; – Delivering personalised experiences to meet customer needs – Meeting and delivering on national strategic objectives – Extending the tourism season into shoulder periods – Creating thematic programme development and promotion (e.g. Ireland’s Wild Atlantic Way)</td>
<td>This has been successfully harnessed in the delivery of the Wild Atlantic Way proposition in the west of Ireland where bespoke experiences have resulted in the delivery of niche tourism to peripheral regions (Yeats 2015) It is essential that development of additional tourism product be closely aligned with tourism development strategies and identified consumer profiles for a specified region. The culturally-motivated visitor will travel off-peak and in the shoulder season offering the potential for development of additional experiential literary tourism products within this period and thus extending the tourism season. Literary tourism provides the perfect opportunity for the development of thematic programme development and promotion (e.g. Bloomsday, Via Kalevala, Wallander’s Ysted etc.</td>
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Comment [AH1]: My general comment on this section was that the OECD trends are all relevant to LT and our project, but that maybe we need to say this more overtly? For example, under each section we could have a short piece of text in bold along the lines of ‘Key Relevance to the Project’ just exemplifying this relevance.

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OECD Tourism Trends and Policies 2016 – Policy Highlights
<table>
<thead>
<tr>
<th>1</th>
<th>Developing targeted and joint-marketing initiatives to selected and niche markets</th>
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<tr>
<td>2</td>
<td>Harnessing the digitalisation of tourism</td>
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Again literary tourism provides the perfect opportunity to respond to this tourism trend. Activities and events which have been developed within the literary tourism sphere and which embrace the digitisation of tourism (e.g. Star and stories – Edinburgh city of Literary, literary tourism apps and augmented reality experiences as proposed in the nascent Peter Pan Moat Brae Experience, Scotland and current Harry Potter Experience, London offer opportunities for memorable visitor experiences.

3 It highlights key requirements for **sustainability and competitiveness** as including:

<table>
<thead>
<tr>
<th>- Supporting tourism SMEs – improving access to knowledge (including links to universities), creating clusters and strengthening links to market.</th>
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<tr>
<td>Curricular development opportunities which include literary tourism as a focus are currently being developed in Ireland and which link to enterprise solutions and SME development agendas. The Project will further amplify this work and develop shared learning with partner universities in Lapland to create a similar approach for literary tourism development in Northern Finland.</td>
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<tr>
<th>- Improving service quality – providing skills training and promoting standards and quality certification in particular sectors.</th>
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<tr>
<td>As above the partnership model already in formation in Ireland and in the Multidimensional Tourism Institute model in Finland is intended to provide a best practice framework for integrated skills development in the development and delivery of literary and cultural tourism in the partner regions.</td>
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<tr>
<th>- Promoting long term investment – identifying sites, supporting feasibility studies, facilitating development procedures and providing financial incentives.</th>
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<tr>
<td>This trend speaks to the requirement for project support from the NPA Programme so that the potential of this literary tourism initiative may be realised for the benefit of partner country profiles and in leading an international response to the development of niche cultural tourism in peripheral areas.</td>
</tr>
</tbody>
</table>

4 It positions **access and transport** as key enablers to achieving tourism potential and specifically in destination development.

Trends in tourism transport in the OECD area show air and road travel as the dominant modes of transport and with major transport hubs (including cruise terminals and large airports) playing an increasingly large role in facilitating connectivity. The creation for example of thematic tourist travel - where the transport element is embedded into the product appeal (e.g. literary driving trails - places in landscapes connected via driving routes, integrated signage etc) is noted as being a factor for the stimulation and development of tourism spread within a region.

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1 OECD Tourism Trends and Policies 2016 – Policy Highlights
It identifies the growth of the sharing economy as being particularly evident in the tourism sector with information shared across digital platforms and accessible on a range of mobile devices and cultural shifts in consumer behaviours – with consumers increasingly open to the idea of sharing resources, being more experimental, and seeking authentic experiences when travelling.

The key opportunities for tourism arising from the growth of the sharing economy which relate to development of the literary tourism potential in the NPA include:

- Expanding and enhancing consumer options, travel experiences and cultural exchange;
- Growing the market for tourism services, especially amongst younger travellers;
- Employing under-utilised assets and enabling product growth without significant investment;
- Stimulating new entrepreneurs and innovation amongst traditional service providers and
- Spreading tourism to less visited areas where new investment is limited

The direct contribution of tourism to OECD countries

As percentage of GDP and employment, 2014 or latest year available

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9 OECD Tourism Trends and Policies 2016 – Policy Highlights
10 Ibid
11 Source: OECD Tourism Statistics (Database). StatLinks2http://dx.doi.org/10.1787/88893319595
7. **Baseline SWOT Analysis of Literary Tourism Across the NPA**

A SWOT analysis of the extant literary tourism sector in the NPA region reveals the following:

**Strengths**

- Existing associations and connectivity with literary landscapes, literary places and literary people across the partner region.
- Range and depth of literary tourism experiences, associations, events, festivals and attractions across the NPA region and partner country profiles in particular.
- The existence of a range of UNESCO City of Literature designations both within the partner region and working in close partnership with literary players in the NPA region.
- Similarities in literary and cultural traditions spanning the region (including oral traditions, myths and sagas, literature related to war and conflict, literature impacted by rural and isolated locations and referencing life on the periphery etc.).
- Market-readiness for literary tourism in particular NPA locations (Scotland, Ireland).
- Significant exemplar events and festivals which celebrate literary icons and literary traditions which have, and continue to be, motivators for international visitors.
- Similarities in identified needs of culturally-motivated tourists across NPA region.
- Appeal to international visitors through the delivery of authentic and immersive cultural and literary tourism experiences within partner area.
- Evidence of impact from literary tourism specific events and initiatives to on local economies and tourism development in peripheral regions.
- Evidence of an educational framework which supports applied tourism development and policy in practice.
- Models of cross-collaboration which have already resulted in successful literary tourism initiatives with international appeal (Yeats 2015 – Sligo, Dublin, London).

**Weaknesses**

- Lack of statistical data generally for cultural tourism and literary tourism in particular in partner region impacting identification of market scale and potential.
- Lack of co-ordinated approach to literary tourism development within literary places, destinations (with notable exceptions in Edinburgh and Wigtown, Scotland).
- Lack of visibility of the cultural/literary tourism sector within tourism policy agendas in a range of NPA country profiles resulting in few examples of literary tourism promotion by tourism agencies.
- Differing definitions of cultural tourism across the partner region and impact on customer segmentation focus as a result.
- Maturity of market for literary tourism NPA regions (significantly - Faroe Islands, Greenland, Svalbard Islands and parts of Finland).
- Ease of access to destinations and peripheral regions for the development of a co-ordinated literary tourism offer.
LITERARY TOURISM MARKET ANALYSIS IN THE NORTHERN PERIPHERY AREA

- Under-utilisation of digital technologies (including social media platforms) resulting in poor visibility of range and depth of existing product available (local promotion evident but fewer references on international visitor-facing sites).
- Under-utilisation of good search engine optimisation and translation tools for existing literary tourism initiatives, attractions etc.

OPPORTUNITIES

- Maximising the transfer of key learning in defined literary tourism from market-ready locations to locations with literary tourism development potential.
- Optimising shared learning and evidence of successful approaches to literary tourism development from mature city markets and best practice models, towards realising literary tourism development potential in peripheral areas (UNESCO-designated City’s of Literature, Literary Festivals, Book Town models).
- Potential for inter-connectivity in the region through thematic place-based responses to literary tourism (e.g. contemporary literature, children’s literature, oral traditions and language).
- Leveraging digital platforms and technologies to increase visibility of the sector to defined market segments (including user-generated content and responses to literary experiences, creating a call to action for visitors and possibility of an online literary tourism portal).
- Potential for sectoral development in response to OECD references to trends in global tourism for the development of authentic cultural visitor experiences and niche market focus with evidence of literary tourism as an attractor in choice of destination.
- New policy developments in some NPA partner areas which support the development of a co-ordinated approach for cultural tourism (and by association literary tourism as part of the cultural tourism agenda).
- Development of a shared narrative for literary tourism and inclusion of literary tourism in the wider tourism policy agenda and in tourism promotion.
- Transfer potential for data collection and measurement model (e.g. Greenland etc.) to other NPA regions.
- Opportunity to develop and promote new educational models which incorporate SME development of literary tourism potential across NPA.
- Development of a framework for involvement of SMEs in realising literary tourism development potential.

THREATS

- Internal country profile responses to developing new literary tourism products and services.
- Lack of data collection models to understand the potential positive impact on tourism numbers as a result of sectoral development.
- Involvement and commitment of tourism agencies in promotion of the literary tourism product and in understanding literary tourism development potential.
Understanding of SMEs as to how they might engage with and create new engaging tourism literary related tourism products and services.

Poorly coordinated tourism offer locally in destinations.

Under-utilisation of existing literary tourism assets and lack of innovation in literary tourism products and services.

Overlooking opportunities for interconnected thematic tourism development across NPA.
8. Best Practice Literary Tourism / Cultural Tourism Case Studies

Given the existing nature of literary tourism in the NPA which includes areas of widespread and coordinated literary tourism development (Scotland) to areas where no literary tourism offer currently exists (Faroe Islands, Svalbard Islands, Greenland), the purpose of this section is to present an overview of exemplar models of best practice literary/cultural tourism models which reference the potential for planned development of literary tourism in the NPA and which have the capacity to deliver key learning for such development. The choice of cases studied reference:

- Co-ordinated approaches for literary tourism development related to key literary figures
- Models of cultural/niche tourism development responding to place
- Literary tourism initiative which have achieved significant international impact and
- Cultural tourism approaches which have created a destination focus for niche tourism in peripheral regions.

Case Study 1: Yeats 2015 – Ireland

Yeats 2015 was a year-long national and international celebration of the life and works of the Nobel Prize winning poet William Butler Yeats, marking 150 years from his birth on June 13th 1865. The celebrations were rooted in Sligo – Yeats’ ‘spiritual home’ – and connected with his life and works in Dublin, Galway and London in particular. The aim of the year was to shine a light on his significant contribution to Irish literature, drawing visitors to Ireland to begin to understand what inspired him and to share that experience. Institutions and organisations spanning literary, cultural, historical and academic fields from around Ireland and the world partnered with Yeats 2015 to offer a diverse and rewarding series of events acknowledging and celebrating the range and depth of his work and that of his family. Through Yeats 2015, Ireland’s intention was to make a bold statement to the world about its rich literary heritage and showcasing its contemporary literary wealth.

At the outset the project crafted its vision with reference to the following core principles:
1. Celebrating Yeats as an important emblem of Ireland domestically and globally
2. Delivering authenticity of Yeats - the man and his literary work and impact
3. Developing a legacy approach to literary experiences beyond the year
4. Embracing the concept of “place” that inspired the work of Yeats in programme delivery
5. Contextualising contemporary literary, artistic and creative practice, while respecting literary tradition
6. Being transformative and innovative
7. Re-imagining Yeats and his legacy to create renewed connectivity with the people of Ireland
8. Creating meaning and relevance for Yeats in a contemporary Irish context
Target markets for the year included:

- Culturally Curious - individuals who actively seek out authentic cultural experiences, both domestic and international
- Education market and academics, including the youth audience
- Literary motivated tourist
- Social Energisers - Fringe crowd/ Early Adopters: lending a contemporary cache to the year and creating an appetite for association
- Incidentally interested visitors - those for whom the programme was of passing interest rather than a prime motivator to visit Ireland.

Partners and collaborators included:

- Tourism bodies (national and international), local authorities, agency partners, network of embassies in Ireland
- Curators of highlight events for the four key events in the year
- Producers of fringe events through organisations at regional and local level, many connected to places associated with Yeats' work
- Creative industries SMEs developing cross-cutting collaborations reflective of Yeats influence
- SME and micro tourism businesses delivering Yeatsian experiences
- Arts and cultural communities (and their representative bodies) creating collaborative and developmental responses and experiences to celebrate the year in their locale

Steps taken to achieve success

- A national oversight group was brought together to oversee the development of the project master plan, governance model and risk assessment framework.
- Working groups were established to deliver on programming, marketing and communications, event management, and funding and reporting
- Development of a content marketing plan and the creation of marketing collateral and a distinct and authentic identity for the year
- Access to a dedicated marketing and public relations resource
- An initial awareness campaign creating both anticipation of attendance and a desire to be involved as a partner or sponsor
- Development and implementation of target-specific marketing and public relations plans for the agreed key market segments, with priority given to international markets
- Key Performance Indicators and a measurement infrastructure to facilitate the collection of baseline data and impact of the initiative.

International market impact

At the end of 2015 Tourism Ireland, the agency responsible for marketing Ireland to overseas visitors reviewed the overseas impact of the year. Highlights of international marketing successes included:

- A publicity impact delivering an equivalent advertising value (EAV) to Ireland over the year of €3,478,844 and a circulation to 32,136,890
- A joint media partnership with the Telegraph UK to core market segment in Great Britain delivering an estimated online and print readership of 68,022,000

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11 Source Tourism Ireland Yeats Activity Update December 2015. www.wdc.com
Literary Tourism Market Analysis in the Northern Periphery Area

- London Yeats Event, June 16 delivering significant impact in UK and Irish press
- Yeats 2015 Facebook page 4.3K likes
- Total reach of 2,954,290 via Facebook posts as at 7 December 2015
- Twitter – 1,644 tweets, 2,576 following and 2,105 currently following
- Dedicated Yeats Ezine in target markets reaching 839,866 consumers worldwide
- Development of industry opportunities with tourism businesses
- Prominent Yeats 2015 displays at international tourism trade shows including ITB Berlin, WTM, Best of Britain and Ireland, CMT Stuttgart and PHS Show
- Funded press familiarisation trip for 24 international literary journalists resulting in publicity circulation of 4,689,955 with an EAV of €494,095
- Italy – Feltrinelli Bookstore promotion and competition for a trip to Dublin resulting in 41,368 views and 15,450 competition entrants with 1.5 million flyers distributed across their stores in Rome, Milan and Naples.
- Three-month exhibition of lines of Yeats poetry featured on Shanghai Metro with and EAV of €286,000 = reciprocal arrangement between Irish Rail and Shanghai Metro.

The map below highlights the locations worldwide where events related to Yeats 2015 were held.

A large portion of audiences were reached through collaboration with national and international organisations, with key stakeholders generally accessed through the Yeats 2015 Steering Group network of contacts e.g. education partners in Ireland, cultural institution involvement nationally, embassies worldwide, academic links and planned media campaigns. This highlights the requirement for access to international networks to develop international audiences and increase global reach. Attendance numbers at events held under the Yeats 2015 banner ranged from small-scale events attracting upwards of 100 visitors to large-scale coordinated events attracting numbers from 500 to 15,000 people.

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12 Youtube.com, Accessed 7 January 2018
13 www.twitter.com/@yeats2015WB, Accessed 7 January 2018
Michigan University undertook an in-depth look at the short-term economic impact and the long-term legacy potential of Yeat’s 2015 and stated that “One of the observed challenges regarding Yeats 2015 is the large number and diverse group of stakeholders with a vested interest in celebrating Yeats’ life who are not in regular contact with each other. Given the work that these stakeholders are accomplishing individually, an event such as Yeats 2015, which requires these groups to work together, represents unprecedented opportunities for collaboration and idea sharing” 15. They mapped the diverse stakeholders as including:

![Diagram of stakeholders]

Legacy is oft cited as a natural output from a specific large-scale event, but legacy takes time to materialise and needs concerted effort behind it. Legacy from Yeats2015 has been measured as events, relationships, ways of working that happened directly as a result of Yeats2015 and may not have happened otherwise.

1. Development of a programme management model which can be used in the future for similar landmark projects and large-scale events
2. Establishment of connections at a national and international level
3. Creation of new creative and cultural programmes and works spanning the arts and culture sphere
4. The establishment of a new Scholarship via the University of Limerick and the University of São Paulo who have launched a W. B. Yeats scholarship
5. In destination street art in Sligo
6. Provision of public access to literary place synonymous with W.B. Yeats – Thoor Ballylee

**Key learning:** Evidence of the impact which a co-ordinated approach between relevant partner agencies can have on delivering motivated and incidental audiences to peripheral regions for a themed concept and legacy tourism proposition.

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16 Ibid
CASE STUDY 2: ROBERT BURNS – SCOTLAND

Burns night has traditionally been celebrated across Scotland by members of the Scottish public, not simply those interested in his work or the field of literature. In the lead up to Burns’ 250th Anniversary in 2009 a specific emphasis was put on expanding the use of Burns as a cultural icon in order to attract greater numbers of tourists (Scottish Government 2005). Additionally, £100,000 was dedicated to the Robert Burns World Federation in order to help with the goal of attracting international tourists (Scottish Government 2005). This initiative and the financial commitment behind it would indicate that promotion surrounding Robert Burns as a literary icon is aimed at specialist interest tourism and not the incidental tourist.

Experiential offerings related to Robert Burns include a wide variety of attractions located across Scotland in both rural and urban areas both related to the author and where no specific relationship exists. These attractions combined with the Burns Night activities illustrate that Burns as a literary brand in Scotland has the capacity to drive audiences for a range of different experiences both literary and social, in larger cities and smaller towns across Scotland. Robert Burns’ experiences in Scotland include:

<table>
<thead>
<tr>
<th>Name</th>
<th>Overview of attraction / experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robert Burns Birthplace Museum</td>
<td>The Robert Burns Birthplace Museum is located in Ayrshire and consists of the cottage where the bard was born, gardens built in his honour and a museum of his works. The museum holds events including exhibitions, talks and activities on Burns Night.</td>
</tr>
<tr>
<td>Ellisland Farm Museum</td>
<td>This museum, located in Dumfries and Galloway is where Burns lived at age 29. Guided tours are available of the farm where Burns lived and which inspired many of his nature poems.</td>
</tr>
<tr>
<td>Robert Burns House</td>
<td>This house on Burns Street in Dumfries was Robert Burns’ final resting place. It is now a museum of memorabilia including early editions of his books and the study where he wrote much of his poetry.</td>
</tr>
<tr>
<td>Edinburgh Literary Tours</td>
<td>Edinburgh’s designation as the first UNESCO city of literature in 2004 arguably confirmed the city’s literary tourism standing and promotes literary tours of the city of which Robert Burns plays an important role.</td>
</tr>
<tr>
<td>The Writers Museum Edinburgh</td>
<td>The Museum houses a permanent Robert Burns collection, portraits of Burns and his writing desk from his house at Dumfries.</td>
</tr>
<tr>
<td>Burns an’ a’ that! Festival</td>
<td>Burns an’ a’ that! is a festival that has taken place in May annually in Burns’ home region of Ayrshire since 2000. It includes traditional and contemporary music and art, food and drink as well as literary events.</td>
</tr>
<tr>
<td>Robert Burns Night Suppers (January 25th)</td>
<td>Similar to the ‘Dead Dinners’ held in Dublin, Ireland associated with James Joyce, the Burns Suppers experience consists of Burns poetry recitals, traditional Scottish food such as cock-a-leekie soup, haggis, neeps and tatties, and whisky and dancing. These events are held across Scotland. Some of these events are informal suppers held by individuals where others are dedicated tourist events organised across the country.</td>
</tr>
</tbody>
</table>
Our research shows the following strengths in the Robert Burns Literary offering in Scotland:

- In addition to the extensive range of literary landmarks, which are open as tourism attractions/museums; tours, festivals and events connected to Burns have been initiated to capitalise on the potential of literary tourism.
- Fostering Robert Burns as a cultural icon and promoting the widespread celebration of Burns night has successfully cultivated a ‘Burns brand’.
- Marketing campaigns regularly use ‘The Burns brand’ to increase visibility to international visitors.
- The online visibility and coherence of the Burns offer acts as a driver for the literary tourism visitor, making it easy for them to choose Scotland as their destination, specifically for the shoulder tourism season.

Literary tourism in Scotland is characterised by a great deal of connectivity between agencies cohered by Edinburgh UNESCO City of Literature, which has a wealth of information available for the literary tourist on its website. The VisitScotland and CreativeScotland websites also provide a listing of literary tourism attractions across the country.

**Key learning:** Success in capturing the essence of a specific literary figure / literary place through a dedicated day or associated event (as also evidenced for literary figures across NPA region) as the motivator for both engaged and incidental domestic and international visitors.

**Case Study 3: Biennial in Glass and Ceramics, Bornholm, Denmark**

The Bornholm model has been chosen for its successful engagement of a creative community of small players in the rural island location of Bornholm in Denmark and its impact in delivering motivated international visitors to this location. The island is widely known for its visual art and craft culture (ceramics and glass). The establishment of the Bornholm Biennial, an international symposium for European contemporary glass and ceramics with exhibitions, workshops, masterclasses and lectures, delivers international niche market tourism in large numbers to Bornholm for two months between September and November every two years.17 Bornholm shows commonality with other peripheral / rural regions in its declining population, higher unemployment rate, however it has a reputation for tourism in that it is seen to offer the ideal holiday destination for Danish and German families with income from tourism representing 1.9bn DKK in 2015 and the 6th biggest tourism destination in Denmark during its short tourist season.18

A close cooperation exists between The Royal Danish Academy of Fine Arts, School of Design and the affiliated school on Bornholm, which offers unique workshop facilities for glass and ceramics and is supported by a regional partnership made up of local government, the local tourism agency, the chamber of commerce, the Bornholm Art Museum, the Bornholm School of...

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17 The biennial festival is named – The European Glass/Ceramics Context and oscillates every two years between the disciplines of ceramics and glass with 2016 being a glass event.
18 VisitDenmark, The Economic Contribution of Tourism in Denmark 2013.
Design, the Grønbech’s Gaard Gallery, and the Museum of Glass in Ebeltoft. Events making up the biennale are designed to provide a place for the European glass and ceramics community to meet and discuss global practice and trade every two years, and a call for international visitors to this Baltic Sea haven. Bornholm shows the potential for the development of a similar model of integrated partnership with relevant agencies and organisations for literary tourism in peripheral areas, by highlighting the impact niche tourism can have on a motivated audience.

**Key learning:** Opportunity for development of niche tourism initiatives in a peripheral region, which have the potential to motivate international audiences. Focus on educational and intellectual agenda associated with a Symposium event, creating a reason for the international community of practice to attend.

**Case Study 4: Southern Literary Trail, USA**

The Southern Literary Trail is America’s only tri-state literary trail connecting mythic places that influenced great novelists and playwrights of the 20th Century, conceived during a meeting of literary enthusiasts, festival organisers and museum directors from Georgia, Alabama, and Mississippi at the Fitzgerald House in Montgomery in 2005. The Trail traverses the states of Mississippi, Alabama and Georgia where great American writers and playwrights found their inspiration. The Trail comprises 22 different towns spread across these three states and featuring the homes of no fewer than 34 writer, poets and playwrights including F. Scott Fitzgerald, Tennessee Williams, Lillian Hellman, Harper Lee and Truman Capote. Designed as a self-guided experience with no defined start or end point, it allows the visitor to dip in and out of the experience as they so choose or indeed to follow the trail in its entirety.

Every two years a biennial Trailfest is held across the partnering states from February to May and billed as a tri-state literary festival with events, performances, heritage tours, writers’ symposiums etc. The events are multidisciplinary in nature spanning the arts and cultural sphere through film, visual arts and music. It is this range of events which attracts a diverse audience base form.

A range of agencies and organisations which span both the literary, tourism and education sectors are involved in the support and continuity of the Trail e.g. This Goodly Land in Alabama providing a literary may of Alabama’s Literary Landscape and the Alabama Bureau of Tourism as promotion partner an centres for creative practice and creative arts peppered along the Trail route. What is notable in each area is the inclusion of the Visitor Welcome Bureau providing information for the visitor on the relevant elements of the Trail in their location.

**Key Learning:** There are three key elements of learning which related to the development of a literary tourism product in the NPA region. The first is the development of a singular thematic construct for the Trail; that of celebration of writers from disparate locations yet within a defined place (Southern States). The second in the involvement of tourism bodies and local agency partners working together to deliver the trail across three separate states, so that the opportunity for the non-literary visitor to happenchance upon the trail during their visit is made all the more possible when they seek generic tourist information locally. The third element is that of combined promotion online, albeit that the website could do with some drastic updating, the information...
provided is comprehensive and contained in a single location so that the literary-specific visitor can find what they want from the trail in advance of their visit.
9. **Literary Tourism Market Analysis in NPA by Country**

The following pages present an overview of the tourism market in the NPA country profiles within specific reference to literary tourism. They seek to identify the market maturity of literary tourism and/or readiness for literary tourism development on a country by country basis and in alignment with existing tourism policy agenda. In many instances it was particularly difficult to access information relating to identifiable literary tourism. This does not necessarily mean that there is no extant literary tourism offer but rather that visibility and promotion of literary tourism is patchy at best and unconnected for the most part to the cultural tourism product available in NPA country profiles (with notable exceptions of Scotland and Iceland – via their individual UNESCO City of Literature websites).

**Finland**

**Tourism Market Overview**

Finland recorded 5,444,514 international visitor bed nights across the country in 2017 representing a decrease of almost 6% from 2016 and highlighting some interesting changes in visitor country of origin. Finland is seeing a dramatic growth from China and Asia and with a substantive drop in visitor numbers over the five year period from Russia in particular.

Responding to consumer needs from the Chinese and Asian markets will therefore be an important factor in continuing to grow tourism numbers in the coming years. A fairly even spread of visitors exists across all core markets for travel during both winter and summer months, indicating the potential for tourism products to be developed across the season.

**Literary Tourism**

*The Kalevala*, compiled by Elias Lonnrot in the 19th century is a cornerstone of the Finnish nation; an epic poem that cemented the Finnish language in writing and initiated a tide of nationalism that eventually resulted in Finland’s independence from Russia in 1917. It is based on the oral culture of the inland provinces of Finland of Karelia and Savolliina. Literary events relating to the Kalevala remain popular today. On specific example being the construction of the ‘Via Kalevala 2016-2035’ a dedicated 1000km cultural walking route based on the Kalevala in the Suomi region of Finland from Paikkar Torpava to Uhtua. A planned series of walks will continue until the 200th anniversary of the Kalevala in 2035. This new literary route is presented as a tourism initiative which references Finnish-Karelian folklore. In addition the Finnish National Opera has recently premiered a new ballet based on the Kalevala presenting opportunities for connectivity between wider audiences for culture and those with a specific literary motivation. The project combines health tourism, cultural and natural experiences combined, with appeal to city and urban dwellers who are seeking opportunities to get back to nature and understand cultural identities and traditions. A number of multi-disciplinary festivals dedicated to literature or which feature literary events, are held annually across the country. Such larger-scale events held within the NPA partner region include: Words and Music in Kajanni, Say That Again! - Language and Literature Week, World Village Festival and the Sylvi Symposium.

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19 Visit Finland - Travel Trade Annual Trends www.visitfinland.com
Most of the well-known writers from Finland either lived or were born in the and remained there for their lives; so in terms of literary tourism, the main attractions for this market are located in and around the capital city Helsinki and the southern part of the country. The Finnish Literary Association, FILI present opportunities for internationalisation of the Finnish literary tradition and contemporary voices via its representation at international book fairs including the Frankfurt Book Fair. A large network of free libraries exists and Finland is only second to Iceland in the publication of new titles annually with up to 14,000 books published annually in three languages Finnish, Swedish and Sami.

Lapland in North Finland is home to the Sami people. In this cultural tradition literature is broader than the written word and creates linkages between tradition and innovation. Evidence of this is apparent in the relationship between the traditional epic yoik songs and contemporary poetry with several Sami artists utilising multimedia approaches for their creative expression, with Nils-Aslak Valkeapää (winner of the Nordic Council’s Prize for Literature, 1991) significant in this regard. Valkeapää is credited as revitalising Sami cultural expression in innovative and creative forms providing an expression of Sami cultural history and the richness of language in his works as specifically in his combined traditional yoik performed with modern instruments and popular music.

Despite the richness of literary heritage and tradition in Finland, literary specific tourism is not widely developed across the country at the present time. However, the indigenous traditions of the Sami culture and their multidisciplinary creative expression offers the potential for development of a tourism tradition in Lapland which might address some of the inherent challenges of sustainable tourism in this sensitive landscape. In addition the interconnected and multilayered relationships which exist with Russia and which resonate in war literature in particular (across the South Savolaxka and central Finland – Kainuu region) create opportunities for thematic literary tourism development in these areas which respond to cultural identities and in turn are a driver for tourism.

Finland is also home to a collaborative model of tourism and education development in its Multidimensional Tourism Institute (MTI) in Lapland. MTI combines the knowledge base of the Lapland Tourism College, University of Lapland and the Lapland University of Applied Sciences and incorporates a student body of over 1200 tourism students annually. Established in 2009, MTI has pursued cooperation between institutions at different levels in teaching, research and tourism service activities. In developing education and research in tourism, MTI cooperates closely with the business community in Lapland, the international scientific community, and the relevant educational organisations and authorities. Cooperation of this nature which blurs the boundaries between institutions is unique in Finland and rare internationally, seeking to deliver a cradle-to-grave approach to sustainable tourism development.
ICELAND

Tourism Market Overview
The latest tourism figures available for Iceland relate to the period up to 2016 and show the total number of overseas visitors at just fewer than 1.8 million and spending ISK 359.7 billion. Most visitors come via air access to Keflavik airport with other airports representing less than 3% of air traffic. About 101,000 visitors come via cruise ships which primarily port at Reykjavik but also at other ports around the country. Employment in tourism has seen year on year growth of 60% annually since 2012 and visitors span all four seasons of the year, with spring and autumn being the shoulder season.

VISITORS BY MARKET ('000)

<table>
<thead>
<tr>
<th></th>
<th>Winter</th>
<th>Spring/Autumn</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nordic</td>
<td>38</td>
<td>70</td>
<td>67</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>177</td>
<td>87</td>
<td>52</td>
</tr>
<tr>
<td>Central/S-Europe</td>
<td>69</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>N-America</td>
<td></td>
<td>164</td>
<td>210</td>
</tr>
<tr>
<td>Other</td>
<td>124</td>
<td>132</td>
<td>147</td>
</tr>
</tbody>
</table>

Literary Tourism
Iceland’s capital city Reykjavik is home to UNESCO’s 5th City of Literature designation and also home to Icelandic medieval literature, including the Sagas of the Icelanders and the Poetic Edda (medieval Icelandic text). This literary heritage is a central part of the nation’s cultural identity with story-telling an important part of its cultural history. Iceland has only around 330,000 inhabitants and very few speakers of the Icelandic language beyond the country. Literature plays a vital role in cultivating the language which undergoes constant renewal and development in fiction in particular. The new World Language Centre, which opened in 2017 and which has at its core the objective to encourage language skills and cultural literacy in Iceland, works in close partnership with Reykjavik UNESCO City of Literature.

Several Reykjavik writers have received international acclaim with Halldór Laxness awarded the Nobel Prize for Literature in 1955. A number of writers have won the Nordic Council’s Literature Prize, among them are; Thor Vilhjálmsson, Einar Már Guðmundsson and Sjón, with Guðrún Helgadóttir, Kristín Steinsdóttir and Ragnheiður Gestsdóttir winners of The Nordic Children’s Literature Prize. Contemporary Icelandic writers are published in increased number in translations throughout the world. Literary publishing in Iceland is also a booming industry with five titles published per every 1,000 Icelanders annually.

Reykjavik is home to a range of literary festivals and events including: Reykjavik International Literature Festival, held biannually and attracting internationally-acclaimed authors from Europe and beyond. The Moorland International Children’s and Youth Literature Festival also held biannually. Literature forms an integral part of the programmes for the Reykjavik Arts Festival, Reykjavik Culture Night, Winter Lights Festival and the Reykjavik Children’s Culture

20 https://bokmenntaborgin.is website of Reykjavik UNESCO City of Literature
21 Statistics Iceland
Festival. The Reykjavík Reads festival incorporates various themes connecting literature and people in different ways.

12% of visitors in winter and 8% in summer indicated that Reykjavík was one of the most memorable aspects to their visit to Iceland; however the data available does not break down these figures into motivated literary / cultural tourism. Beyond Reykjavik the other key area in Iceland where a literary tradition is evident and accessible to visitors is in the north in Akureyri with the Akureyri Museum again preserving and promoting the Icelandic myths and sagas.

Penetration of literary tourism from cities to peripheral areas is not wholly evident with few location-specific literary tourism initiatives beyond those of Halldor Laxness Museum just outside Reykjavik and the Literary Retreats peppered around the capital city. This is unusual in that any of the Icelandic sagas highlight references to topographical features on the landscape across the country in peripheral areas – highlighting the opportunity for the development of literary tourism mapping related to Iceland’s saga tradition and the transfer of tourism potential beyond urban areas. Opportunities for shared learning in literary tourism best practice exists not only in relation to the nature of events developed and promoted via Reykjavik UNESCO City of Literature but also regarding ways in which the Icelandic cultural identity is promoted across the country. In addition is the already noted evidence of connectivity between Irish myths and legends and those of the Icelandic people, presenting an opportunity to create a thematic construct for literary tourism between these two NPA partner countries.

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22 Óladóttir O.Þ, Tourism In Iceland In Figures June 2017
Tourism Market Overview
The tourism market to Ireland was estimated to be worth €6.6 billion in 2016, representing a growth of 9.5% on 2015. Total overseas visitors to Ireland in 2016 grew by 8.8% to 8.742 million with an additional 1.358 million coming from Great Britain and Northern Ireland remaining the biggest source of international travel.

<table>
<thead>
<tr>
<th>International Market</th>
<th>% Growth in 2016</th>
<th>% of Total Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Britain</td>
<td>8.5%</td>
<td>41.5%</td>
</tr>
<tr>
<td>Mainland Europe</td>
<td>7.7%</td>
<td>35.6%</td>
</tr>
<tr>
<td>North America</td>
<td>14.2%</td>
<td>16.9%</td>
</tr>
<tr>
<td>Other long haul markets</td>
<td></td>
<td>6.1%</td>
</tr>
</tbody>
</table>

Tourism is characterised by the fact that consumption takes place where the service is available and tourism activity is frequently concentrated in areas which lack an intensive industry base, it is credited with having a significant regional distributive effect. Regional distribution of tourism to the NPA related area in Ireland (including the border area) accounted for 3.705 million visitors during 2016 delivering revenue of €1,119bn.

The core market segments for literary tourism fall within the defined market segment of the ‘Culturally Curious’ visitor. These visitors choose their holiday destinations carefully and are independent ‘active sightseers’ looking to visit new places, and expand their experience by exploring landscapes, history and culture. They are unlikely to return for some time once they have visited a new place, and often travel in a couple or as individuals and rarely in a family group. The age group for this demographic is 40 plus years. The Culturally Curious visitor is attracted to authentic travel, delving deeper into the history of a location, seeking unusual experiences.
The culturally curious visitor is a core visitor segment for Ireland’s tourism brands which incorporate the NPA area in Ireland, namely the Wild Atlantic Way and Ireland’s Ancient East. Alignment with the core principles of these brand propositions and their core market segments will ensure work to further develop the existing literary tourism offer is connected for promotional purposes and access to tourism-related funding opportunities as and when they are available.

**Importance and rating of destination issues among overseas holidaymakers (%) 2016**

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**Literary Tradition and Literary Tourism**

Ireland is home to a rich history of literature and literary icons, it is recognised worldwide as a nation of writers, poets and playwrights with no fewer than three Nobel Laureates for Literature in George Bernard Shaw, Samuel Beckett and W.B. Yeats and its capital city, Dublin a UNESCO City of Literature, home to Oscar Wilde, James Joyce and many more. Literary tourism is a core element of Ireland’s tourism brand spanning festivals, immersive experiences, attractions, landmarks, tours, summer schools and educational aspects. A multitude of literary places associated with writers and poets offer the visitor a wealth of literary tourism experiences from dedicated literary festivals to sites associated with literary works or the lives of writers. Specifically in the West of Ireland in the area which forms part of the NPA region Sligo and Galway deliver a significant sense of place associated with the poet W.B. Yeats and have developed a range of literary specific experiences for the culturally motivated and general tourist market. Within the NPA region of Ireland connectivity to literary icons is equally evident with a distinct connection between W.B. Yeats and Sligo, Pádraig Ó Conaire and Galway, Douglas Hyde and Roscommon, John McGahern and Leitrim amongst others.

Over the years literature has formed an important aspect of Irish culture and literary tourism development has centred around the great writers, playwrights and poets of old, however new approaches to literary tourism development which link more contemporary players in Irish literature are evident in such events as the Cúirt Festival of Literature and multi-disciplinary arts programmes and festivals. Educational programmes in tourism within the western region are also developing new curricular content which incorporates the literary tourism agenda – specifically in the Sligo Institute of Tourism.

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24 Source: Fáilte Ireland’s Port Survey of Overseas Holidaymakers 2016
Scale of market and demand for literary tourism

Evidence of motivated literary tourism within the NPA area in Ireland is outlined in the Case Study for Yeats 2015 earlier in this document, which highlights the outputs of a coordinated approach to literary tourism development and the impact on local economies in rural areas. Location-specific tourism in the NPA region of Ireland includes literary places associated with the author W.B. Yeats in particular – Sligo, Gort, Coole Park - and places referenced in his literature including Coole Park, Lissadell, Drumcliffe etc. There is evidence of SME involvement in literary tourism in these locations however a cohered literary tourism offer for the visitor does not yet exist and requires further development. The establishment of a dedicated interpretative space for W.B. Yeats in Sligo offers the possibility of being a literary gateway to the region, enabling and facilitating the growth of literary tourism through an interconnected and collaborative approach working with tourism industry, business and literary/artistic agencies and players.

While there is no specific data available for literary tourism, specifically 85% of overseas visitors in 2016 cited interesting history and culture of the country as an important motivator for their visit. Statistics are available for cultural activity in 2016. These statistics show visits to sites of cultural interest in the west and northwest accounting for 31% of the regional spread of overseas visitors. Cultural visitor’s average length of stay was 13.4 nights (across the country). The market distribution for overseas cultural visitors in 2016 is outlined in the table below.

<table>
<thead>
<tr>
<th></th>
<th>Gardens</th>
<th>Cultural/historical visits</th>
<th>Houses/castles</th>
<th>Monuments</th>
<th>Museums/art galleries</th>
<th>Heritage/Interpretive centres</th>
</tr>
</thead>
<tbody>
<tr>
<td>Britain</td>
<td>19</td>
<td>27</td>
<td>21</td>
<td>18</td>
<td>23</td>
<td>22</td>
</tr>
<tr>
<td>Mainland Europe</td>
<td>48</td>
<td>42</td>
<td>43</td>
<td>45</td>
<td>41</td>
<td>42</td>
</tr>
<tr>
<td>France</td>
<td>9</td>
<td>7</td>
<td>7</td>
<td>8</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>Germany</td>
<td>11</td>
<td>9</td>
<td>10</td>
<td>10</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>North America</td>
<td>24</td>
<td>23</td>
<td>28</td>
<td>27</td>
<td>26</td>
<td>28</td>
</tr>
<tr>
<td>Other long haul</td>
<td>9</td>
<td>8</td>
<td>8</td>
<td>10</td>
<td>10</td>
<td>8</td>
</tr>
</tbody>
</table>

Opportunities for shared learning in literary tourism best practice

Plenty of opportunities for sharing best practice exist within the Irish context not least of which in the development and delivery of large-scale literary festivals and international marketing opportunities and networks utilised to attract literary tourists from across the globe to Ireland. Additional developments in the literary tourism sector which interconnect other cultural traditions including language, song and dance and story-telling have synergy with other NPA country profiles and present opportunities for SME-led products and services for literary tourism. It is a generally held view in the literary community that new product development for the literary specific visitor is required to improve Ireland’s literary tourism offer, deliver additional authentic experiences and celebrate the work of contemporary Irish writers, providing a new narrative for literary tourism and an expression of Ireland’s cultural and literary identity in the 21st century. This view can be given expression through the design of new literary tourism initiatives, which reference contemporary approaches to literary tourism in Scotland, Iceland and Sweden in particular.

25 Statistical data included in this section is sourced from: Fáilte Ireland Tourism Facts 2016 - CSO/Fáilte Ireland NISRA/Central Bank of Ireland and Fáilte Ireland Cultural Activity Tourism Performance 2016
26 Fáilte Ireland Cultural Activity Tourism Performance 2016
27 McGuckian, M. Literary Tourism and Yeats’ Legacy – What can we learn from Shakespeare’s birthplace?
Northern Ireland

Tourism Overview
Tourism in Northern Ireland accounted for 5.2% of GDP in 2016 and 5.4% of total employment, with an overseas visitor spend of £51.00 per night. International visitor numbers (outside of Ireland and the UK) have grown from 509,089 to 743,166 between 2011 and 2016. Northern Ireland has also seen an increase in visitor numbers from the Republic of Ireland in the same period of 19%. The sustainability of this market growth is being underpinned by the launch of a new Tourism Development Strategy for Northern Ireland, Tourism 2025 during 2016, which sets out the key vision and aspirations for the future of tourism in the region. This strategy projects growth over the period to achieve an annual £1bn target from tourism to the economy in 2025 (from a position of £723 million in 2015). The relevant action points for the implementation of this strategy which reference the potential for literary tourism development include:

1. Investment in the development and communication of an inspiring marketing proposition that will provide international standout for Northern Ireland
2. Increase the presence, targeting and sales readiness in out of state markets
3. Invest in experiences and products that increase dwell time of out of state visitors
4. Deliver events of scale that can attract out of state visitors and enhance international reputation and attractiveness as a destination
5. Refocus events strategy to drive the development of indigenous events with international appeal.

Literary Tradition and Literary Tourism
Northern Ireland is home to a rich literary tradition from the Ulster Cycle (a 12th century body of medieval Irish heroic myths and sagas of the Ulaid – what is now eastern Ulster. In more modern times the literature of Northern Ireland has taken on a distinct identity related to place and the historical significance of the region being born in 1922 with the partition of Ireland. The tensions surrounding this partition provided a theme for many authors and this theme lives on in current literary development.

Northern Ireland’s literary culture and heritage is strong, offering many locations which inspired a multitude of writers. Home to literary giants including; Heaney, Beckett, Lewis and Friel, each of these writers are memorialised through a series of different literary tourism experiences available across the state. Examples include:

- Poet - Seamus Heaney: whose writing bears the impact of his surroundings in Londonderry. The places he immortalised in his literature are celebrated at the Seamus Heaney Homeplace in Bellaghy – where he came from, where he wrote about, and where he is buried
- Playwright Samuel Beckett: Whose life and works are celebrated at the annual, Happy Days International Beckett Festival in Enniskillen
- Author C.S. Lewis: Where the C.S. Lewis Experience brings you on a tour of east Belfast following in the footsteps of the author. Walk in the Mourne Mountains which provided

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the inspiration for his *Chronicles of Narnia*, take an Authentic Ulster tour, or attend the C.S. Lewis Festival in November each year.

- **Playwright Brian Friel** whose work is celebrated at the annual Frielfest held in his hometown of Derry.

Working alongside this range of literary tourism product is the organisation Arts Over Borders - which aims to connect the literary traditions of what is termed The Northern Literary Lands. This area consists of eleven counties spanning Northern Ireland and north west of Ireland each of which has a powerful landscape connection to either a giant of literature or a great literary text: Armagh (Jonathan Swift), Derry (Seamus Heaney & Brian Friel), Down (St Patrick and C. S. Lewis), Fermanagh (Samuel Beckett and Oscar Wilde), and Tyrone (Flann O’Brien & John Montague) in Northern Ireland and Cavan (Dermot Healy), Donegal (Brian Friel), Leitrim (John McGahern), Louth (the Tain), Monaghan (Patrick Kavanagh) and Sligo (W. B. Yeats) in the Republic of Ireland. The border becomes a spine that holds these counties and their literary commonality together from Ireland’s Ancient East (The Tain, St Patrick and mythical Narnia) to the North West’s Wild Atlantic Way and its landscape associations with two late contemporary literary giants, Brian Friel and Seamus Heaney.

The Northern Literary Lands programme puts these writers centre-stage through their suite of festivals and events, informing audiences and connecting the literary culture and landscape of the region, seeking to deliver greater visitor numbers through a series rather than occasional, isolated events programme. Literary festivals are harnessed as the motivator to the region, demonstrating extraordinary literary associations and beautiful landscapes that inspired many great writers.

This strong literary tradition lives on in contemporary literature of the state also and the opportunity exists to develop beyond highlight festival tourism towards a coordinated approach to literary tourism which spans the state and provides a destination-based experiential offer for overseas tourism aligned with the stated objectives for tourism development nationally. The opportunity to create linkages between the literary tradition in the west of Ireland and Northern Ireland 'Developing …clustering …promoting …delivering experiences' provide the backbone for how Tourism NI intends to deliver on its objectives. The above developmental approach to literary tourism in the region gives voice to this intention and presents opportunities for interconnectedness between tourism development agencies both in Ireland and Northern Ireland in driving motivated literary visitors to the state.

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*Tourism 2025: A Ten Year Strategy for Tourism in Northern Ireland, Department for the Economy, 2016.*
Literary Tourism

Norway is home to a range of International festivals, literary places, literary landmarks, award-winning libraries and picturesque Book Towns. The Ibsen Museum and adjoining Writer’s Centre in Oslo are dedicated to the life and works of author Henrik Ibsen, hailed internationally as the founder of modern drama. Ibsen was born in Skien, southern Norway, and its los possible to visit his childhood home there.

Nobel laureate Knut Hamsun is the country’s most famous novelist. Hamsun had an enormous influence on European and American literature and the Hamsun Centre in the town of Hamarøy, Nordland, where he lived, celebrates the life and work of the author. The building itself, creates

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Innovation Norway, 2015 Tourism Survey
Literary Tourism Market Analysis in the Northern Periphery Area

a focus for a design-conscious / architecturally-motivated visitor and having received several prizes for its striking architecture. Hamsun’s childhood home is but 5km from the centre and is open to the public offering insights into his life in Hamarøy.

Over 60 literature festivals take place every year in Norway. From the Children’s Book Festival in Grimstad, southern Norway to the Finnmark International Literature Festival, from the Raptus Comics Book Festival in Bergen to Kongsberg Crime Fiction Festival. The most popular festival is the Norwegian Literature Festival, which takes place in Lillehammer in late May-early June annually and attracts popular authors from around the world and tens of thousands of visitors every year.

Like Wigtown in Scotland, Norway also boasts a Book Town. Located in Mundal, Fjærland it offers a range of bookshops, cafes a gallery and small shop and boasts miles of shelves, housed in quaint little sheds along the picturesque fjord. It celebrates Norwegian literature but has titles in other languages too. This Book Town is somewhat less developed than what is on offer in Wigtown, yet presents opportunities for Mundal to leverage development opportunities, as already evidenced in the Scottish model through shared learning.

Reading and literature are embedded into the Norwegian psyche and an all-embracing part of the Norwegian culture. Public libraries are a focal point for locals and visitors alike with a range of beautiful libraries, some of which have achieved international acclaim for their architecture and design. The most striking is Vennesla Library in southern Norway with Bode’s Stormen and Tromsø Library, both in northern Norway which serve as cultural landmarks in their respective cities. Alongside the library system are the Literature Houses (Litteraturhuset) another feature of Norway’s literary landscapes. The Literature Houses are run by an independent, non-commercial foundation aiming to generate interest for literature and reading. There are literature houses in Oslo, Bergen, Trondheim, Fredrikstad and Skien. All are dedicated to literature and comprise spaces where writers can meet, cafes, presentation rooms, performance spaces. Each is a form of cultural edifice a creative hub for both domestic and visiting creatives, and those with a specific interest in literature.

The Sami Culture is also prevalent in northern Norway offering the same opportunities for literary tourism development as its Finnish, Swedish and Russian counterparts.
**Scotland**

**Tourism Overview**

Tourism in Scotland accounted for 10.3% of GDP in 2016 and 10.9% of total employment, with an overseas visitor spend of £82.00 per night. The key inbound markets for Scotland are USA and Germany with Canada and Australia offering excellent tourism spend in destination behind the primary markets. For the US markets a primary driver is Scotland's history and culture with experiences of past history via legends, myths and romantic stories as a perceived benefit which makes Scotland stand out for them. The German market by comparison is motivated by the sense of place, 'mysticism, a mythical place'. They expect a richness of history and legend (a history & culture defined by strong and unique Scottish character inspired in part by images of Highlander, Outlander and Braveheart).

Tourism insights for Scotland highlight the 'Millennial’ market as a driver for change alongside established travellers, with consumers influenced by the use of digital technologies as enablers of tourism product and infrastructure. Scotland views itself as a 'living laboratory' a place where the landscape, rural and urban, plays ‘an integral role in delivering an inspiring tourism experience for tourists to Scotland. The urban experience delivers consumer’s needs in terms of culture, social engagement, and activity. Scotland’s cities offer a wealth of diversity in terms of tourism product. From Glasgow's shopping and night time economy (to) Edinburgh’s renowned cultural landmarks” offering the consumer a year-round tourism experience.

Scotland is gearing up for Year of Scotland’s Stories in 2022, announced in 2017 by the Secretary for Culture, Tourism and External Affairs. This will provide a massive boost to the visibility of literary tourism in Scotland and is expected to lead to increased SME motivation to engage with literary tourism tools.

**Literary Tradition**

Scotland has a very well-developed literature ecosystem in place comprising, writing, reading, publishing, festivals, events literary trails etc. It is arguably the leading literary tourism location across the United Kingdom. In 2004 Edinburgh was designated as the world’s first UNESCO City of Literature. In its initial stages the initiative was backed by both the Scottish Arts Council (now Creative Scotland) and the Scottish Executive. An independent charity was set up; The City of Literature Trust. The City of Literature Trust works to promote literary Edinburgh; champion Scotland’s literature and develop international literary partnerships.

In addition to the role played by Creative Scotland and The City of Literature Trust in promoting literary tourism, there is clear evidence of a working partnership between these agencies and VisitScotland. ‘The year of Creative Scotland 2012’ was an initiative led in partnership by EventScotland, VisitScotland, Creative Scotland and VOCAL. £6.5 million of National Lottery funding was invested in this programme, and it has been followed by annual ‘theme years”, such as 2017’s Year of History, Heritage and Archaeology which Scotland’s literary tourism sector

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**Notes:**

31 VisitScotland, Research and Statistics - German International Factsheet 2016
33 Edinburgh UNESCO City of Literature, http://www.cityofliterature.com
34 Creative Scotland’s 10-year plan sets out a shared vision for the arts, screen and creative industries in Scotland. Accessed at creativescotland.com
has tapped into\textsuperscript{35}. It was but one of many interagency initiatives aimed at expanding cultural tourism in Scotland. The Scottish Government also plays an important and direct role in development and funding of these initiatives.

The literary sector’s importance is born out in the delivery of an evidence-based Literature and Publishing Sector Review which, through the themes of connection, collaboration and coordination sets out a scoping for the sector and notes emerging trends as including; “festivals, storytelling and new digital formats.”\textsuperscript{36} In addition the document notes European Union funding for culture and creative industries is as an important element for the development of the sector and for partnership working in particular. It references the three indigenous languages of Scotland as cultural assets which provide a resources and inspiration for many writers.

The Edinburgh International Book Festival, which claims to be the world’s most international book festival, held more than 1,000 events in 2017. Its success was one of the key drivers in attaining the UNESCO City of Literature status for the city. Its audience in was 250,000 plus in 2015, highlighting the potential for an event to develop to this scale in just over 20 years.

**Literary Tourism**

Scotland is home to a range of internationally recognised literary greats (from past times and in current writers). Association with these individuals provides a range of tourism experiences for general and literary specific tourists form International literary festivals to tours, events, mobile applications, illuminated tours of literary landmarks and literary places and landscapes and events etc.\textsuperscript{37} Literary tourism in Scotland is well-developed, with proven backing of the literary sector, and has impacted on Scotland’s economy. The UNESCO City of literature designation for Edinburgh (the first of such designations) is the shining star in Scotland’s literary sector. Its coordination of activities, events, relationships, inter-agency working and future-facing agenda leverages investment in the sector and promotes it to a global audience. New and development agendas and programmes by Edinburgh UNESCO City of Literature embrace digital technologies and platforms to connect people with place and expand that global reach.

In terms of the development of literary tourism, the Review\textsuperscript{38} sees and opportunity for greater inter-connectivity between Scotland’s literature and Scottish tourism which is views as including, ”literary heritage destinations, literary trails, wider promotion of festivals and events. Unique, locally specific promotions and activities,” while leveraging Edinburgh’s UNESCO City of Literature designation (and associated events and activities) alongside the Netherbow Storytelling Centre on Edinburgh’s Royal Mile and in the delivery of literary hubs throughout Scotland. The Review recommends a case for increased tourism development be made with the relevant tourism bodies and agencies to trigger investment, and promotion in the literary tourism sector.\textsuperscript{39}

Despite being a relatively small country, Scotland supports a diverse and growing range of festivals, many of which take place in peripheral areas. In the past decades additions have included Boswell Festival, Ayrshire “the world’s first festival of biography” and Bloody Scotland.

\textsuperscript{35} www.visitscotland.com  
\textsuperscript{36} Creative Scotland - Literature and Public Sector Review. Nordicity, 2015  
\textsuperscript{37} Examples of which are included in the associated Literary Tourism Product Database  
\textsuperscript{38} Creative Scotland - Literature and Public Sector Review. Nordicity, 2015  
\textsuperscript{39} Ibid P.10
a crime-writing event in Stirling that has grown swiftly since its establishment, capitalising on Scotland’s "tartan noir" genre of writers (e.g. Ian Rankin, Val McDermid) but also inviting connections with the flourishing Scandinavian crime-writing scene. In particular Scotland’s rural peripheries and islands - from Wigtown and Ullapool, to Shetland and Islay - have embraced the possibilities of the literary festival to enhance tourism, especially in the shoulder season and this has been supported by the nation’s tourism agency, VisitScotland (through EventScotland) and by the arts agency, Creative Scotland.

Wigtown, in Dumfries & Galloway, is a notable example of this trend. Basing itself on the model of Hay-on-Wye in Wales, since 1998 it has marketed itself as Scotland’s National Book Town (part of the international Book Town movement), offering a cluster of around a dozen bookshops and associated SMEs. Community regeneration - economic and social - has been at the heart of this project: currently more than 100 volunteers in a town of just under 1,000 people contribute to the project. At its core is the development of new and diverse audiences for literature and creating opportunities locally for engagement in literature for young people and as a destination for cultural and literary tourism. Wigtown Book Festival’s attendance grew 18% between 2014 and 2016. Total attendance now stands at 24,594 with 11,225 unique visitors. An independent economic impact survey found that the festival has created £2.1m for D&G’s economy and that the event had a 23:1 return on public investment, 40 highlighting the potential which niche festivals can have on local economies and indeed those in peripheral areas. One of Wigtown Festival Company’s latest initiatives is The Open Book, an Airbnb experience that allows visitors to run a bookshop in Wigtown during their stay (see note on page 11 about OECD’s comments on the "sharing economy"). The Open Book is fully booked until 2021 and has garnered media attention from around the world 41, helping raise the profile of the Wigtown and create a network of international cheerleaders for Wigtown.*

Elsewhere in Dumfries & Galloway, the Peter Pan Moat Brae Experience is being developed in the townhouse in Dumfries & Galloway where J. M. Barrie, creator of Peter Pan, played as a child, will deliver an immersive experience for children as an enchanted land of children's stories and to with the intention of becoming the national centre for Children's Literature and Story-telling. The Peter Pan Moat Brae project presents an opportunity to address issues relating to the lack of cultural facilities and opportunities and the other challenges associated with rural living, including the development of enterprise. Moat Brae when completed has the potential to attract in excess of 45,000 visitors to Dumfries annually, which in turn, will protect existing jobs whilst creating an estimated 40 new jobs locally.

40 Wigtown Festival Company Business Plan 2017-2021
41 Since December 2017 WBF has been featured on the BBC1 One Show, CBS US Morning Show, Channel 7 Australia’s “Sunrise” and the UK edition of The Times.
Literary Tradition and Literary Tourism

Sweden is home to no fewer than seven Nobel Laureates and a wide array of internationally renowned writers, poets, playwrights. A key theme is Swedish literature is that of the crime novel with multiple authors over many decades choosing this genre for their writing. Much of this writing is connected to place. This genre affords a range of immersive literary tourism experiences including; the Wallender Guided Tours in Ystad, Camilla Läckberg’s - Murder Mystery Tour in Fållbacka and Stieg Larsson’s Millennium Tour of Stockholm.

In addition the children’s writer Astrid Lindgren with the Astrid Lindgren Museum, Junibacken, Cultural Children’s Centre featuring interactive experiences and a theme park attraction (Astrid Lindgren’s World) for children associated with her books.

While connectivity to literature is an integral part of growing up in Sweden, from our research, the Swedish literary scene is primarily associated with literary writing and reading rather than as a developed literary tourism offer with the concentration of notable literary players located in the south of the country and outside of the NPA area.

Sami tourism is growing in popularity in the north of the country however reference for Sami culture generally relate to indigenous craft, reindeer-keeping etc. It is almost more the rule than an exemption that Sami artists express themselves through the use of more than only one medium. Through the introduction to Sami literature, the reader also gets acquainted with the history and the culture of the Sami. The oral tradition in Sami culture is rich and creative with the Yoik a distinctive Sami musical and poetic tradition (love poems, myths, historical tales and poetry that describe people, places, animals, and fish). Opportunities exist within the literary tourism space to extend expression of the Sami cultural identity through tourism experiences which incorporated the oral traditions of the Yoik as part of the literary heritage of the Sami people and which could have a shared approach across the relevant NPA partner profile countries.
**Faroe Islands**

**Tourism Overview**
The Faroe Islands tourism strategy was redeveloped in 2013. It concentrates on the development of a focused and coordinated marketing strategy under a single joint brand for the islands as its strategic priority alongside changes in legislation to assist tourism growth and facilitation of tourism product and education within the industry. The latest data available for tourism to the Faroe Islands relates to the year 2015. This information does not specify either cultural tourism or literary tourism in the breakdown of its visitor data. It does however provide an overview of the core visitor profile which shows that 40% of tourists are from the Nordic countries - Demark in particular. More than 54% of the total visitor population is 45 years or older and 38% spend between 5-8 nights in the country during the summer season and on average 2 nights when measured over the entire year. Core visitor interests include culture, with 72% of visitors expressing that culture is important to them and 54% wanting connectivity with local people. Cruise Ships provide a significant number of tourists to the islands annually; the majority of visitors are from the UK, Germany, the USA, the Netherlands, Canada and Australia. The tourism strategy prioritises international markets as follows:

<table>
<thead>
<tr>
<th>Market A</th>
<th>Nordics, Germany, Great Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market B</td>
<td>Benelux, Italy, Spain, France</td>
</tr>
<tr>
<td>Market C</td>
<td>USA, China, Japan, Russia, other European countries</td>
</tr>
</tbody>
</table>

Revenue from international tourism has increased from 1.2% to 1.4% of GDP from 2011 to 2015. In 2015, the total amount tourists spent on services and general goods was DKK 665 million, an increase of 60% from DKK 416 million in 2011. However, 2015 was a particularly significant year for tourism to the islands because of the total solar eclipse that year. 60% of total revenue was derived from international transportation and travel agencies, with 14% from hotels and other accommodation, 11% food and drink, with the remaining 15% shared between domestic transportation, clothing sales and tourism product and excursions.

**Literary Tourism**
Our research was unable to uncover any evidence of literary tourism product, visitor demand or a motivated literary or cultural audience in the Faroe Islands and as a result no opportunities for shared learning in literary tourism best practice in this location. We did however find that during May 2017 the Nordic House in Tórshavn held a five-day conference on *Islands and Literature - The Tower at the End of the World*. This event brought together poets and scholars from across the globe to explore and debate the role of islands and island literature on contemporary literature, places of isolation, exception, of different imaginations, topographies and on their reference to place-making – from local to regional, national and global. While we were unable to find specific outputs or papers from this conference its relevance for the development of literary tourism on the islands is notable and highlights the significance of the oral tradition of Faroese language and literature, as deep-rooted in its culture and part of the communal memory of the Faroese people, which is mirrored in Icelandic, Greenlandic and Irish.

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43 Visit Faroe Islands Annual Report 2016
literary cultures in particular. ‘While other languages disappear, the Faroese language is developing and today is the pride of the Faroese culture’.

GREENLAND

Tourism Overview
Greenland has a well-developed tourism focus with a clear market segmentation understanding as outlined in the diagram below. Greenland identifies Culture Lovers as those who involve themselves in; kaffemik, sled dog tours, self-guided city walks and visits to rural locations. Authenticity seekers / Ethnophiles as identified as those who want to ‘get under the skin’ of a place, meet locals, not involve themselves in the tourist traps and in many instances will avoid cities altogether; seeking to understand more about the indigenous cultural traditions of their location. The Cultural Appreciator making up 4% of total tourism visitors and identified as, ‘a bit of a bookworm and dives into historical culture’. This segment researches heavily before choosing their destination and value curated experiences. A combination of these segments best represents the market opportunity with the most potential for literary tourism development in Greenland.

Tourism in Greenland grew at a rate of 7.6% in 2016, higher than the average global tourism growth rate and with a total of 75,553 international visitors. It is anticipated that continued steady growth can be expected in the coming years. Core markets for international tourism development are Denmark, Germany, USA, France and Great Britain, with particularly high growth levels for the German, French and Danish. Access is by air and sea – cruises with 80% of visitors coming from locations in Denmark and 20% coming via Icelandic routes.

46 Ibid
47 Greenland Tourism Report 2016
48 Greenland Tourism Report 2016
In collaboration with NATA (North Atlantic Tourism Association) and Air Greenland, Visit Greenland carried out market surveys in 2016-17 of 4,000 respondents in the 4 core markets Germany, Great Britain, France and USA, providing valuable insights into potential travellers to Greenland.

While there is no specific mention of the development of cultural or literary experiences or products within the Visit Greenland Strategy 2016-2019 core strategies for tourism development include;

- Extension of the tourism season into shoulder period in particular - Currently Greenland is at capacity between July and August annually. Seasonal tourism development is therefore important in terms of maximizing available beds and flight capacity outside of busy period.
- Collaboration with Iceland - Although Iceland is not a primary tourism market in itself; instead, it is an important partner as a hub for tourists travelling to Greenland via Keflavik Airport and Reykjavik Airport, and for those taking Iceland-Greenland combination trips. Greenland’s efforts in Iceland are therefore centred around supporting the air routes between Iceland and Greenland, as well as establishing close collaboration with Icelandic operators and stakeholders on marketing materials, market research, market-specific campaigns, FAM Trips and press visits. In order to underpin joint tourism projects and market research in selected markets, Iceland, Greenland and Faroe Islands work closely together via NATA (North Atlantic Tourism Association) 49.

What is important within Greenland is that such literary tourism product development would not be specific to place and therefore has the potential to increase tourism numbers during the shoulder season, thus responding to a core strategic objective of the Greenland Tourism Strategy (dependant on the nature of the experience developed).

**Literary Tourism**

Our research found no specific evidence of literary tourism product available in Greenland save for the annual Nuuk Nordic Culture Festival (a contemporary arts-and-culture festival) presenting a range of new productions, plays, literary events partly reviving oral story-telling and drawing popular attention locally and domestically. However what was noted is that oral narratives are still very much alive with educational institutions, local museums and libraries occasionally arranging different story-telling events. In the past the Nuuk Nordic Cultural Festival presented university students of literature as transmitters of the least known versions of the best known tales to the public. Narratives told today differ from the myths and legends of the past, but are still part of everyday life for social purposes, exchange of world views and in clarifying cultural identities and belonging. 50 As such the potential for the development of literary tourism products which focus on the revival and continuity of the oral-story-telling tradition would respond to the strategies for tourism growth and the potential for increased connectivity and collaboration with NPA country profiles. In addition, Greenland’s market segmentation model and partnership arrangements which they have in place for data collection with agency partners could well provide opportunities for best practice shared learning with other NPA partners.

10. **Literary Tourism Potential – Analysis and Commentary**

The research shows that the Northern Periphery and Arctic area is home to a range of models of excellence in literary tourism, whilst some are more developed than others the potential for development of a literary tourism initiative as a driver for tourism and for market expansion across the NPA, is one which requires due consideration by national agency partners.

**Why is transnational cooperation required?**

Transnational co-operation is required to respond to the potential for sectoral development in response to OECD references to trends in global tourism for the development of authentic cultural visitor experiences and niche market focus with evidence of literary tourism as an attractor in choice of destination. It is also required to develop a shared response to address the deficit in statistical data generally for cultural tourism and literary tourism in particular in partner region impacts a definitive identification of market scale and potential. In most instances statistical data was available at most for cultural tourism – and even that was patchy at best. This though should not undermine the potential for sectoral development but rather one need to look at the success of the literary sector in spite of this penury of data (no literary or cultural tourism data exists in Iceland and yet it is home to a vibrant literary tourism sector). If such data was available – one can only anticipate how the sector might perform. The region already evidences clear examples of well-developed market data and this is evident across the Nordic country profiles but is particularly evident in Greenland. Transnational cooperation to share such a model would prove hugely beneficial for the overall growth of the tourism sector across the NPA region and would positively impact its ability to market itself to the culturally motivated visitor across Europe the USA and in emerging markets in Asia.

The lack of co-ordinated approach to literary tourism development within literary places, destinations (with notable exceptions in Edinburgh and Wigtown, Scotland) has resulted in the under-utilisation of literary tourism assets and indeed the opportunities for SMEs to becomes involved in the development of associated business which support this sector. This is evident primarily in Ireland and Northern Ireland where the strength of the literary tradition has not been defined to date into more than a series of (high-quality) literary festivals, literary events across a swathe of literary landscapes with many literary associations being run on a voluntary basis, relatively unsupported by local, regional and national agency partners.

The NPA literary tourism project also has the capacity to contribute to wider regional/ national policies. Currently the challenge for development is the lack of visibility of the cultural/literary tourism sector within tourism policy agendas in a range of NPA country profiles, resulting in few examples of literary tourism promotion by tourism agencies. The problem would seem to lie in the use of language with differing definitions of what constitutes cultural tourism across the region. An approach which brings together the relevant sectoral partners (including those related to enterprise development) to create a cohesive narrative for literary tourism has the potential to deliver a more sustainable literary tourism product and a defined literary tourism agenda across the NPA resulting in opportunities for co-ordinated approaches to joint-marketing and programming.

One of the key challenges for the region is the under-utilisation of digital technologies (including social media platforms) and lack of appropriate search engine optimisation. This was particularly evident on many websites accessed during the research process. Such poor use of
existing technologies results in poor visibility of range and depth of existing product available (local promotion is evident but fewer references exist on international visitor-facing sites and in many instances translation tools do not operate correctly). An outward-facing approach which is focussed on attracting the international market is required. A shared platform and communications model for literary tourism across the sector would be beneficial in closing this gap.

What is important about any development within this sector is its meaning and relevance to place. The most successful literary tourism initiatives are associated with place whether related to literary individuals or places within literature. To try to design a literary tourism offer within this backdrop and context would be considered ill-advised, however fruitful the cultural literary tourist might be in enhancing the local tourist economy. To this end NPA country profiles including the Greenland, Svalbard Islands, parts of Finland and the Faroe Islands, would need much greater exploration before a literary tourism initiative was considered. Learning from the outcomes of the proposed NPA project could provide a start on project completion.

Across the region areas of excellence exist in terms of the design, development and delivery of literary tourism enterprises and initiatives. Leading the way in this regard is Scotland with a co-ordinated and championed literary tourism sector which is defined, jointly-promoted and embedded into the tourism product locally. Others who have market-ready literary tourism include Iceland, Ireland (though not within the NPA partner area, Norway and Sweden in particular). Overlaps exist in the target market segments identified as key markets for growth in across the region. In addition, similarities in the profiling of consumers; their motivators, expectations and needs, offers the potential to develop inter-connected, authentic and immersive cultural and experiences across multiple terrains.

Realising Potential

Place-based strategies: The significance of connectivity between culture and place is evidenced in literary tourism attractions across the NPA partner region. Birthplaces, homes of writers, places where writers write and those which feature in literature are important drivers of literary tourism. The peripheral nature of the locations provides a deeper meaning for visitors resonating through similarities across country borders in literary and cultural traditions - spanning the region and beyond into neighbouring countries and reflective of traditions in other EU countries etc. A specific example in this regard is the latent potential for development of oral literary traditions, myths and sagas which share influences across territories (e.g. Iceland/Ireland – myths and sagas; Norway/Sweden/Finland/Russia – Sami yoik tradition and Finland/Russia – Kalevala). These traditions reference cultural identities impacted by rural and isolated locations and reference life on the periphery and are reminiscent of the Homeric Epic tradition in Greece in Southern Europe. The opportunity for inter-connectivity through thematic or genre specific responses to literary tourism is also evident. Additional examples of low-hanging fruit in this regard include;

- The development of literary tourism for children (attractions, festivals and literary locations – and incorporating new technologies and digital solutions)
- The opportunity for further development of places and trails referred to in literary texts.

New models of working and shared learning: Significant opportunities exist for the development of new ways of working and in developing new models of good practice exist
across the region. Maximising the transfer of key learning in defined literary tourism from market-ready locations (within and outside of the NPA region and from UNESCO-designated City's of Literature, Literary Festivals, Book Town models etc.) to locations with literary tourism development potential is a must if country profile wish to realise their literary tourism development potential. Sharing learning from collaborative models which have already resulted in successful literary tourism initiatives with international appeal (Yeats 2015 – Sligo, Dublin, and London) should also form a core element of the project process.

**Leveraging digital platforms and technologies** to increase visibility of the sector to defined market segments (including user-generated content and responses to literary experiences, creating a call to action for visitors and possibility of an online literary tourism portal).

**Growing and expanding markets:** Similarities exist in the nature of literary tourism assets across the region and beyond. The baseline strengths to grow and expand markets across the NPA in particular are underpinned by the range and depth of extant literary tourism experiences, events, festivals and attractions in partner country profiles. Development of a competency model in developing and delivering a 365 literary tourism offer which utilises festivals as attractors at key points in the tourism season but has the potential to develop growth is the sector off peak.

**Engagement with SMEs** is an essential element for project success. What is required is a clarity of understanding of the potential value and impact which literary tourism can have on peripheral regions, which in turn will give them the confidence to develop new and innovative literary tourism assets locally (and online). Edinburgh UNESCO City of Literature has gone some way to responding to this challenge by developing a Literary Tourism Toolkit for businesses and Fáilte Ireland has developed a Tourism Toolkit for the Development of Cultural Experiences. Together this project could develop a framework to share this learning, working with local SMEs to promote the development of new sustainable tourism enterprises.

**Integrated educational models:** Finally, the opportunity to develop and promote new educational models which incorporate SME development, skills development and literary tourism potential combined should be promoted. The proposed Sligo Institute of technology model, where literary tourism will from a core element of curricular provision combined with the multifaceted approach adopted by MTI in Finland together can deliver a new educational framework that can be shared across NPA.

**Contemporary approaches to literary tourism development:** Two key trends in the approach to literary tourism development are evident from both the cases studied and an understanding of the literary product available in NPA locations. The first is a focus on the importance of literary tours and trails with connectivity which is distinct to place and to the cultural traditions of a location, and the second is the development of approaches for literary tourism which respond to contemporary writing and children's literature.

In the case of contemporary and children's literature, our research showed a move towards these literary genres as drivers for literary tourism. In autumn 2006, VisitBritain launched a literary tourism campaign which aimed to focus on children's literature. The campaign aimed
to capitalise on the success of children’s films such as Harry Potter, Narnia and Beatrix Potter by highlighting the British landscape as featured in the movies or which inspired the work.

During 2010, at the height of this children’s literature trend, VisitBritain focused on cultural and heritage tourism aspects and highlighted the importance of modern literature in influencing levels of tourism to traditional literary attractions. In particular they noted Harry Potter as giving rise to a greater interest in Shakespeare, particularly among Japanese tourists. Among the literary attractions associated with the Potter franchise are Muggle Tours of London and ‘The Making of Harry Potter Tour’ at the Warner Brothers Studio. This is unsurprising given the international success of the Harry Potter books; however it also reflects a trend in literary tourism development. Where we see this reflected in country profiles of the NPA is in locations associated with J.K. Rowling’s, Harry Potter series; Tove Jansson’s, Moomin series and Moominland, Sweden and The Peter Pan Moat Brae Trust’s current development of a new interactive experience in Dumfries and Galloway, reflecting in the location which was the inspiration for J.M. Barrie’s, Peter Pan.

In the case of literary tours and trails these are seen to play an important role in the literary tourism offering. Specifically in Edinburgh their Edinburgh UNESCO City of Literature website refers to literary tours as an essential element of a literary city, asking the question “what’s a literary city without literary tours?” the development of literary tours and new products provide an opportunity for SME engagement with the literary tourism sector in literary places. These immersive and authentic experiences are favoured by the culturally-motivated tourist and can be delivered across rural regions.
11. Conclusion

The proposed Literary Tourism project is ambitious in nature, seeking to deliver new and innovative ways to drive motivated and incidental audiences for literary tourism to the NPA area. For project success and to deliver a legacy impact which responds effectively to NPA programme priorities it needs to highlight the long-term benefit and value of Literary Tourism to the NPA area, to present a new and coherent narrative for literary tourism which references the spirit, identity, peripherality and sense of place of the communities, poets, writers, publishers, readers living in this region to the literary tourism global audience. And so the project must:

- be built on a strong, enduring and multidisciplinary stakeholder partnership
- have clarity of understanding of individual partner needs
- build competency in the development of a literary tourism framework, strategies, marketing, products and services in the NPA literary tourism relevant country profiles
- address key challenges of the NPA area in drawing tourists to remote and peripheral areas by delivering on place-based strategies that complement the local and are framed in the international
- be future-proofed in its delivery model presenting opportunities for connectivity across the region (both within the literary tourism sector and in the end-user) allowing for emerging technologies to form a core element of product and project delivery
- establish examples of economic and entrepreneurial impact via engagement with SMEs and micro enterprises – many of which become the engine for driving and delivering literary tourism experiences over time
- align the project aims with the strategies of the regional and national tourism agencies transnationally and include them in the project development process
- maximise the appeal which literary tourism has for a global audience - delivered through new initiatives, business models and connected programmes for literary tourism across NPA area boundaries

Both ICBAN and the WDC have an excellent track record in developing and delivering in European funded projects. Their capability in presenting an application to the NPA Programme’s 5th Funding Call will deliver a comprehensive and transformational literary tourism development initiative which will benefit all participating partners and in turn literary tourism and cultural tourism visitors to the NPA area.

This project has the potential to transformation literary tourism in the NPA area through innovation in approach, new initiatives, business models, supported entrepreneurship, place-based and inter-connected thematic constructs and programming. It is considered that the real opportunity for the NPA literary tourism country profiles lies in the sharing of literary assets, in presenting a new and coherent narrative for literary tourism which references the spirit, identity, peripherality and sense of place of the communities, poets, writers, publishers, readers living in the NPA area.