

Breaking out of regional lock-in: how to diversify from dominant industries

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Healthcare Tourism

- In 2012, Secretary of State highlighted Portugal's niche growth potential, noting only 1.9% of tourists visit for its health tourism facilities,
- According to Secretary of State for Tourism Cecília Meireles, more than 54% of hotel beds are not used and health tourism might be a strategic solution,
- Algarve HPP Hospital São Gonçalo de Lagos is the first JCI accredited private Hospital in Portugal. It is now approved for both residents and tourists due to the quality of the clinical staff, facilities, experience, etc.,

Healthcare Tourism: Value, Type & Destinations

- For example, 50,000 UK medical tourists per year pay privately for treatment abroad (Lunt, Mannion, Exworthy, 2011)
- Includes cosmetic & dental surgery, cardio, orthopaedic and bariatric (weight loss) surgery, IVF, and transplantation of organs and tissue
- Value approx €75 million (2011; *International Passenger Survey*)
- Leading destinations: India, Hungary, Turkey, Thailand, Malaysia & Poland.

Elderly Care Abroad

- Growing numbers of elderly and sick Germans are being sent overseas for long-term care in retirement and rehabilitation centres because of rising costs and falling standards in Germany (*The Guardian*, 26/12/2012).
- Researchers found an estimated 7,146 German pensioners living in retirement homes in Hungary in 2011. More than 3,000 had been sent to homes in the Czech Republic, and there were more than 600 in Slovakia. There are also unknown numbers in Spain, Greece and Ukraine. Thailand and the Philippines are also attracting increasing numbers.

Germany's Elderly Care: Numbers & Costs

- According to Germany's federal bureau of statistics, more than 400,000 senior citizens are currently unable to afford a German retirement home, a figure that is growing by around 5% a year (*The Guardian*, 26/12/2012).
- The reasons are rising care home costs – which average between €2,900 and €3,400 per a month, stagnating pensions, and the fact that people are more likely to need care as they get older.

The Potential Supply Side

- There are probably 100,000 apartments for sale along the Algarve coast. There are probably another 100,000 that are half built, or would be up for sale if there was a market. They are everywhere. Selling into that kind of market is a hopeless cause.
- Quote: "In Lagos Marina Village, the building - of some 50 stylish apartments - is quiet, with the odd individual 'for sale' sign hanging on the balcony and the external car park contains only 2 cars amongst 40 spaces".

Creativity & Diversity: Film Tourism

- Some regions have evolved a film strategy
- This encourages domestic film-making
- It also encourages on-location filming by foreign film makers
- If a TV series or film is successful, it attracts “film tourists”
- This is a good example of tourism & filming “related variety”

Indian Films: from Kashmir to Interlaken (Switzerland)

- 1970s were days of intense militant activities in Kashmir Valley, India’s film backdrop.
- The first Indian movie shot in Switzerland was **Raj Kapoor’s *Sangam*** in 1964
- **Yash Chopra**, India’s leading film-maker slowly drifted away from Kashmir to Switzerland,
- Many filmmakers followed and Switzerland became an integral part of many romantic Bollywood Movies.
- To date more than 80 Hindi Movies and more than 200 Indian Movies have been shot in Switzerland.

“Bollywood” films in Swiss Alps

- Indian tourists: guests with money to spend
 - Indian tourists who visit Switzerland belong to the “very rich” class, also partially to the “consuming class”.
 - Altogether 170 million Indians are potential guests for Switzerland
 - – guests who are open-minded and strong consumers.
- **Average day expenditure (CHF) by overnight tourists in Switzerland (not including arrival and departure)**
 - **Country 2011**
 - Gulf States 500
 - Japan 400
 - China 350
 - **India 300**
 - Korea 250
 - Russia 250
 - USA 220
 - Switzerland 170
 - Germany 150
 - Source: *Tourism Monitor Switzerland 2011*

Knowledge dynamics in consumption of Skåne film tourism industry

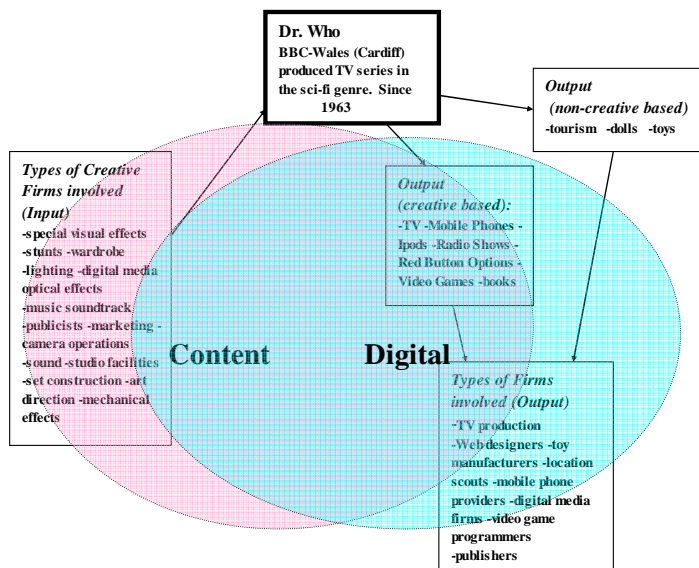


'Sidetracked', BBC's first Wallander series

Economic Value of Film Tourism

- References to Skåne in the *Wallander* detective films yield a Regional Tourism Value increase estimated at 10% or over €60 million annually (Öresund Film Commission).
- If sustained, this can mean an increase of two million tourists over several years.
- Their increased use of lodging, restaurants and recreation, raises Tourism Value of up to €120 million annually.

Cardiff - Innovation Interactions: Dr. Who



Film Tourism in Cardiff

- BBC UK Productions of Dr. Who, Torchwood, Gavin & Stacey, Casualty & Children's TV shows
- Historic Film Locations – 'Tiger Bay' etc.
- *Doctor Who Up-Close* exhibition (costumes, props, etc.)
- BBC 'Drama Village' located nearby
- Film Tourists visiting Cardiff in 2008 - 117,500
- Film Tourist Expenditure in 2008 €62 million
- 1,500 employment associated with Film Tourism

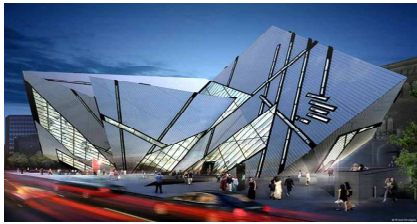


“Starchitecture” as Tourist Attractions

- Now we know some creative industries & cultural economy have tourism impacts
- They employ lots of people that hadn't hitherto been counted as such.
- We realise they give 'meaning and identity' to places.
- We know some places have “it” & others do not..... and those that didn't better get
-‘the Bilbao effect’



Signature Architecture: Libeskind; SANAA & Calatrava – Toronto, Gifu, Essen, Malmö



Starchitects in Basel: Trophy Architect City



Eco-Art and Sculpture Parks

One Aspect of Green Tourism

'Land Art': David Nash in Shanghai Sculpture Park



Randall Page: Organic in New Settings

'Seed': Eden Project, Cornwall



'Stone Dreaming', Yorkshire Sculpture Park



Randall Page: Organic Art in Traditional Settings



Richard Long: Pioneer of Land and Conceptual Art



Stone Circles in the Landscape

MacDuff Circle (2002), by Richard Long in the grounds of the Dean Gallery, Edinburgh



Forest Circles



Andy Goldsworthy

Black stone, white fog



River rock with gold leaf



'Desert Megalith': David Fein, Ramon, Negev, Israel



Megalithic Wales

Pentre Ifan, Preseli, Wales



Bryn Cader Faner, Talsarnau, Wales



Trilithons, Ireland & Sardinia



**Tomba di Gorgali,
Sardinia**



Alan Sonfist, "Circles of Time", each ring represents the narrative natural and cultural history of Tuscany, 3 acres, Villa Celle, Florence, Tuscany, Italy 1989

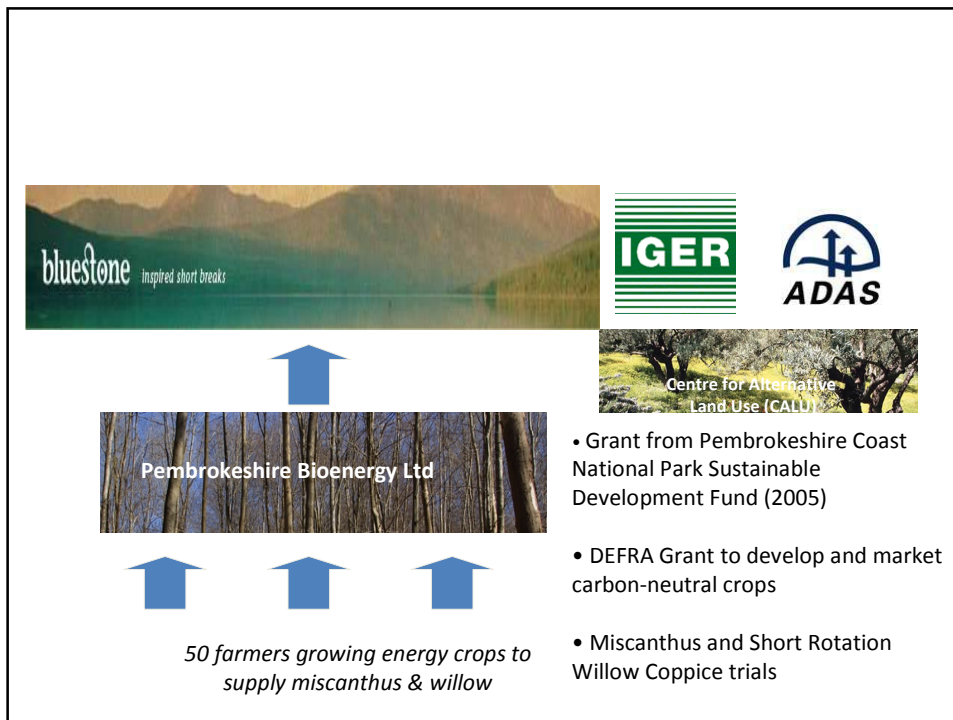


Richard Long 'Ring of Prato Green
Stone' Fattoria di Celle (Sol LeWitt on wall)



Actual "Green Tourism": Bluestone,
Pembrokeshire, Wales

- The Bluestone Project, valued at about €75m million
- 340 timber chalets surrounding a 'Celtic Village' of 80 permanent buildings within the National Park
- Adjoining Oakwood Leisure Park, next to which a Snow Dome, Waterworld, Tropical Garden and Sports Centre are found.
- The facility has a community of up to 2,000 residents and 5,000 day visitors.
- 3 MW Biomass (willow chips) CHP units burning fuel sourced from 2 specialist local farms by *Pembrokeshire Bioenergy*



Martinhal, Algarve. A “green beach resort”



- The hotel uses mainly solar energy,
- has a strict sustainable food philosophy using local ingredients,
- kept many of the local wooded areas intact
- local timber, cane, stone and cork used in construction
- 250 direct jobs (95% of the staff are Portuguese) and another 250 indirect jobs to suppliers, local shops and bars.

Conclusions

- A few examples shown of “Tourism Variety”
- Significant and diverse hidden demand
- ‘Entrepreneurial discovery’ means meeting this with service supply
- EU “Grand Challenges” include Sustainability, Healthcare & Cultural investment
- Algarve has a few shining examples, but to escape “sun & beach” lock-in, more must be developed.