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Conference Paper

Essen and the Ruhr Area: The development of tourism and the role of small firms and entrepreneurs

50th Congress of the European Regional Science Association: "Sustainable Regional Growth and Development in the Creative Knowledge Economy", 19-23 August 2010, Jönköping, Sweden

Provided in Cooperation with:

European Regional Science Association (ERSA)

Suggested Citation: Trettin, Lutz; Neumann, Uwe; Zakrzewski, Guido (2010) : Essen and the Ruhr Area: The development of tourism and the role of small firms and entrepreneurs, 50th Congress of the European Regional Science Association: "Sustainable Regional Growth and Development in the Creative Knowledge Economy", 19-23 August 2010, Jönköping, Sweden, European Regional Science Association (ERSA), Louvain-la-Neuve

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Essen and the Ruhr Area:

The development of tourism and the role of small firms and entrepreneurs

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1. Tourism: A new service industry for an old industrialized region

Like any old industrialized urban agglomeration the Ruhr area had to deal with tremendous structural changes due to the downturn of coal mining and the steel industry since the 1960s. Nevertheless, in the meanwhile the agglomeration as a whole succeeded in creating a comparatively favourable starting position as an important centre for science, services and culture.

During the last three decades it has become a common policy to foster socio-economic transition in old industrialized locations in the context of urban renewal by developing new forms of city tourism. It is often based on culture and events. An additional attempt is "to convert" closed industry plants into heritage sites in order to enhance the attractiveness of a destination and to provide new opportunities for entrepreneurial activities in the field of tourism and services.

There is a growing number of studies and papers on the development of cultural and industrial heritage tourism in old industrialized cities and regions and it refers to examples in Sweden, UK, USA or Germany (Soyez 1988, 1989, West 1988, Hüchering 1997, 1999, Conzen 2001, Helfer 2001, 2004, Gelhar 2005, Biermann 2005, Steinecke 2006). And there is a bulk of studies on urban regeneration and its governance processes in such territories which point out the need for a strong "bottom-up" community influence on national or regional policies aiming at regional or local development. This refers to the engagement of widely accepted local leaders and initiatives within governance networks (Danyelzyk / Wood 1993, Purdue 2001, Healey 2002, Fürst et al. 2004, Forrest & Keanes 2005, Middleton et al. 2005).

Despite of this magnitude of research, little is known about the outcome of measures aiming at urban regeneration by focusing on tourist activity. Amongst the exceptions are Law (1992) and Lanegran/Smith (2009). These authors discuss how in the US joint efforts of private business, authorities and semi-public organizations provided valuable impulses to comprehensive urban renewal incorporating the development of tourist locations at non-traditional destinations. Law (1992) argues that the positive economic effect of tourism development in the context of urban renewal is quite often not for the benefit of poor social groups in inner-city areas adjacent to the tourist spots. Also with respect to cities in the UK there are controverse discussions with respect to costs and prospects, success and beneficiaries of tourism and culture-led urban regeneration strategies. Planners and scholars fear that the strong focus of decision makers on developing cultural and tourism infrastructure will be inevitably linked with a declining consideration of the state of technical and social infrastructure (Evans 2005, Wood 2007). In order to counteract such developments certain authors underline the importance of participation of local citizens and small firms (cf. Thomas / Thomas 2006).

This paper aims to contribute to the knowledge stock in this particular segment of urban economic renewal. It will be of great interest to know, whether and how entrepreneurs and small firms can participate on the emerging tourist industry and what are the concrete potentials and barriers for running a business in an old industrialized territory where tourism has no strong roots.

Therefore, we have analysed the development of tourism in the German Ruhr area with Essen as one of its main cultural centres. Simultaneously to the industrial blight during the past four decades the Ruhr area as a whole gained a growing national and international importance as a centre of business services, science and culture. Further, large effort was given to the infrastructural renewal of the cities in the agglomeration. As a result the building complex of the coal mine "Zollverein" in Essen became enlisted by the UNESCO as a World Heritage Memorial. And in 2006 the Ruhr area was finally nominated as European Capital of Culture 2010. Taking all these factors together, there are some promising preconditions for a successful development of city tourism in the Ruhr area.

Thus, central questions of the paper are:

- Which policy strategies and support measures were conducted at regional and city level in order to promote city tourism?
- How and where has the hotel industry been developed?
- What role play (semi-) public organizations as well as small and medium sized firms in the development process?
- Who tends to govern the newly establishing value chains in tourism and what position remains factual for local small and young firms therein?

Our paper is divided in six parts. This introduction is followed by a discussion of conceptual anchor points, while the study design is briefly described in the third section. Section 4 describes the development of tourism at the regional level, while focusing on the role of public institutions and the position of the tourism sector of the Ruhr area in the national context. In part 5 we take the example of the city of Essen in order to analyse tourism policy in the context of urban renewal and the position of young and small firms within the development process. Further, the interaction and frictions

between public and private stakeholders in city tourism will be sketched out. The paper ends with conclusions on the prospects of city tourism in the Ruhr area.

2. Conceptual anchor points

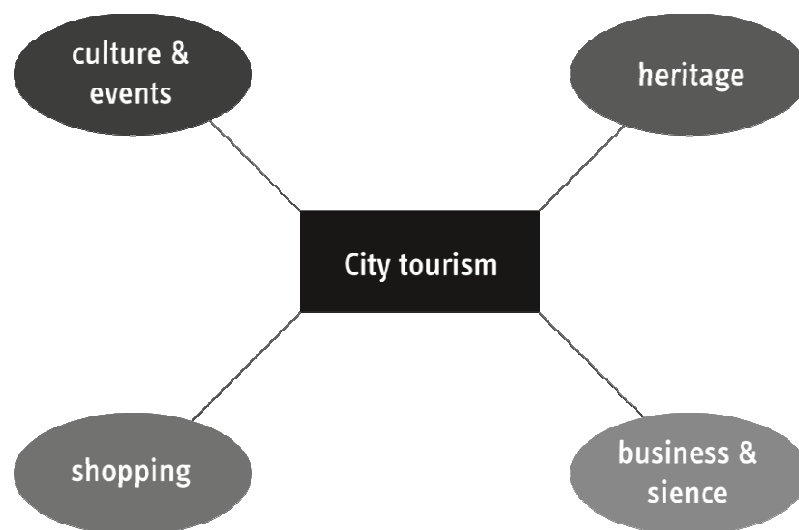
City tourism is a very complex phenomenon, quite difficult to define and to describe empirically. Visitors' motives and types of tourist activity are diverse and different motivations are often combined, e.g. visiting fairs, conferences, meeting business partners, visiting families and friends as well as enjoying cultural activities and mass events (Anton/Quack 2005).

On the demand side we find that city tourists in Germany tend to spend more money than others. We find a high degree of daily tourists. Nevertheless, on average city tourist in Germany stay two nights. In the long run there is a tendency of a slightly growing total number of overnight stays. (Eisenstein/Rosinski 2004, Harrer 2005, DTV 2006). On the supply side city tourism in Germany is characterized by a growing number of beds and lowering capacity utilization, a demand for higher hotel quality, a shrinking supply of low budget facilities and, related to these trends, a growing dominance of hotel chains (Vorlaufer 1993, Eisenstein/ Gruner 2004).

Since urban and cultural tourism is a very competitive market in Europe, innovative concepts are required to open and occupy a new market niche (Steinecke 2002a). With respect to big events several studies on the European Capital of Culture programmes of past 20 years revealed that a big event alone will never be able to revitalise an urban economy. However, it can be used to support existing strategies of urban renewal linked through city tourism and image improvement by highlighting the results of longer-term activities (Palmer & RAE 2004). Thus, sustainable development of city tourism rests at least on four pillars, namely: cultural facilities & events, business & science, shopping and heritage sites as the most distinctive feature of an urban place (figure 1).

Figure 1

Elements of city tourism



Own depiction.

Heritage can refer to individual architectural monuments, a particular townscape, a combination of these factors together with renowned parks and gardens or industrial heritage sites. An industrial heritage site can comprise a single building, building complexes of some square kilometers in size or even a set of locations which form a tourist route of several kilometers lengths.

The capitalization of industrial heritage can be seen as the most promising field of developing a very distinctive concept of city tourism for old industrialized urban areas. The focus on **industrial heritage tourism** opens chances (i) to raise awareness about historical processes and thereby creating some inrush of tourists, (ii) to strengthen the local identity and to create new centres of urban life, (iii) to enhance the regional image to attract new investors and, (iv) to restore and prepare the buildings itself for new commercial and cultural usage (cf. Soyez 1986, 2006). According to existing

research, the use of industrial heritage to stimulate tourism is linked with specific success factors and challenges (table 1)

Thus, it is a challenge to tourism policy to develop and implement a coherent concept, which combines (West 1988, Hüchering 1999, Helfer 2004)

- professional management and marketing of the industrial heritage sites,
- their integration into wider concepts of tourism and urban renewal
- growing value-addition at the level of local (micro) businesses in the hotel and restaurant industry but also in the field of guided tours, merchandising and alike.

Table 1
Industrial heritage tourism

success factors	challenges
<ul style="list-style-type: none"> ▪ unconventional combinations of industrial heritage with other cultural and recreational activities in the same city or region ▪ authentic guided tours (emotional insights in work and life style) ▪ coherent specialized marketing concept ▪ transparent area management and distribution of competences in the fields of tourism, culture, marketing, spatial development ▪ cooperation with local initiatives in order to create public acceptance ▪ reliable financial support from public and private sources in the long lasting renovation phase 	<ul style="list-style-type: none"> ▪ costs for decontamination, renovation ▪ inhabitants “trauma” of losing the old regional economic base ▪ integrating new forms of land use with concepts on urban renewal ▪ mental attitude of the citizens: Missing link between industry - culture - recreation ▪ precarious situation regarding property rights, the financial responsibilities for conservation, reconstruction and long term management

Sources: Soyez 1993, Ebert 2004, Wolf 2005.

Policies to promote city tourism in many regions of the world focus on the establishment of strategic alliances between economic actors and (semi-)public institutions for the purpose of upgrading the infrastructure or marketing campaigns. Such local and regional coalitions seem to be an important success factor in the very competitive market (Steingrube 2004).

This kind of **cooperation and governance** is very often established in the process of conversion of closed industrial plants into attractive tourist spots. The literature on industrial heritage tourism points out that cooperation between governmental institutions and local citizens’ and business initiatives is the ultimate base for the effective capitalisation of industrial heritage sites (Soyez 1993, Thomas/Thomas 2006). Community involvement has many facets. It includes discussions and decisions about

- how the conservation of derelict sites should be organised and financed,
- who holds the property rights and the right to use sites after renovation,
- how to arrange a transparent land use management, and
- how the adjacent city quarters should benefit from heritage sites (and vice versa).

In this regard some studies on “culture”-oriented urban regeneration and the course and effects of the European Capital of Culture event in particular underline the importance to counteract a strong dominance of regional elites by involving a wide range of non-state stakeholders in the process of application and preparation for the event in order to achieve a broad public acceptance (Roth 1999, Hughes et al. 2003, Wood 2007). The experiences of Glasgow (1990) and Rotterdam (2001) indicate that such a wide acceptance is required for a new “urban image” to emerge, which may help to attract investors (Boyle/Hughes 1991, Go et al. 2000, Richards/Wilson 2004). In contrast, the example of the German European Capital of Culture programme of Weimar in 1999 has shown that the exclusion of the public from a long-term planning process can lead to failure of important programme modules and even hindrance of reconstruction of a part of the old town (Frank & Roth 2000).

Apart from the discussion of community involvement the research focus is also on the involvement of micro-firms in tourism development. A number of authors underline the strong dependence of small firms on the course of the transition processes in their immediate surroundings (cf. Thomas 2007). But in order to be able to participate

meaningfully and effectively in partnerships micro firms need to understand how power relations operate on the local and regional level. And in any case they need relationships with stakeholders of political power in order to assert their interests (Reed 1997, Thomas/ Thomas 2005, 2006). Mendlinger et al. (2009) point out certain needs of small hospitality firms in an old industrialized region, which deserve their powerful appearance within public – private – partnerships for tourism development. Examples are (i) educational programs for young entrepreneurs which help to run their daily business with success, (ii) certain public financial support which permits investments in regions which are just recently opened for tourism and, (iii) the withdrawal of (semi-)public tourism development authorities from asset facilitation to strategic planning.

3. Study design

To explore the process of establishing tourism as a new service industry in distressed urban agglomerations and its subunits we choose the relational perspective of economic geography provides as a theoretical base. This concept rests on the propositions of contextuality, path-dependency and contingency (Bathelt & Glückler, 2003: 128-129), which implicitly draw on sociological and institutional approaches that are also popular in SME and entrepreneurship research. At a particular time and in a particular territory, firms (entrepreneurs) are closely linked to suppliers, customers and organisations through communication and business relationships (contextuality; cf. Granovetter, 1985; Grabher, 1993). Economic decisions, actions and interactions of the past enable and constrain present activities of the economic agents. Moreover, they direct future intentions and actions to some extent (path-dependency). Although present economic action is to some extent an outcome of economic evolution at a particular location, its character remains subject to unforeseeable changes and is, therefore, fundamentally an open-ended process. Present economic action may reproduce or transform contextual structures, thereby shaping the preconditions for future action (contingency).

Our study work is based on the results of the authors' empirical research, which was initiated as part of an evaluation of a public urban regeneration programme in the German federal state of North Rhine-Westphalia ("Socially Integrative City"). This study examines the strategies and results of different activities to foster local economic development in six urban areas of North Rhine-Westphalia (NRW), mainly located in the Ruhr area. One of the case studies was dedicated to the city of Essen. Here, the analysis focuses on the performance of newly-emerging tourism activities, which were supported by the redevelopment programme (cf. Neumann et al. 2007).

Based on the results of this study, ongoing research dealt with the preconditions and potentials of cultural and industrial heritage tourism in Essen in the context of the European Capital of Culture RUHR.2010 programme. It focuses strongly on the participative approaches which were linked to the improvement of tourism infrastructure and policies to develop tourism until 2010. This research work was based on a multi-method empirical framework comprising in-depth interviews, workshops with local economic development stakeholders, document analyses, surveys among local entrepreneurs and businesses, and statistical analyses based on survey and administrative data. In Essen, nine in-depth interviews with important stakeholders and experts were carried out in the course of the initial study in the 2005-2006 period, eight personal interviews were accomplished during 2007 to 2009.

In a last step we used the data bank of the Essen Chamber of Commerce to trace the development in the hotel industry as well as of the micro firms in the hospitality sector (Bed & Breakfast facilities – B&B). In addition we conducted short telephone interviews with 62 out of 102 micro firms of Essens B&B sector to collect missing information.

4. Socio-economic transition and tourism development at the regional level

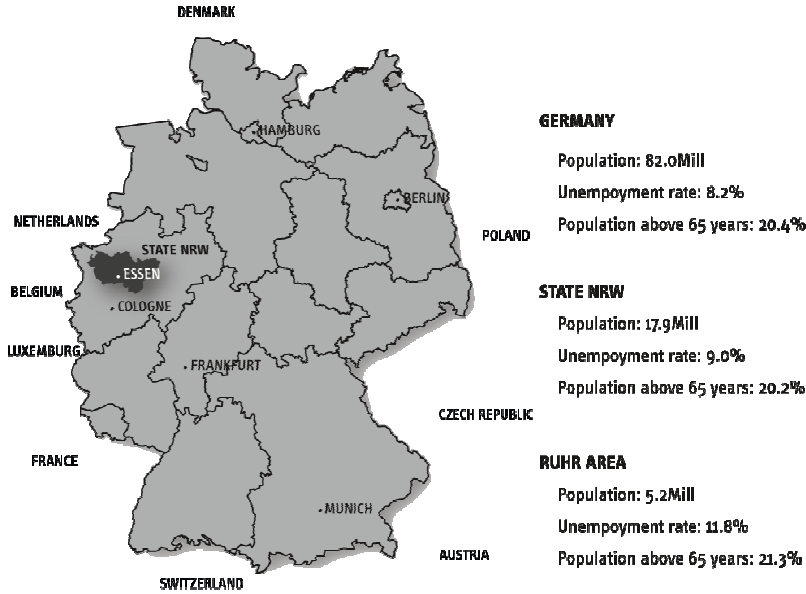
4.1. Ruhr Area – the German lab for socio-economic changes

There is no generally accepted definition of the Ruhr area, which is located in the German federal state of North Rhine-Westphalia (NRW). We follow the delineation of the Ruhr Regional Development Association (Regionalverband Ruhr, RVR; figure 2). Accordingly the area covers 4,435 km² and consists of 5.3 million inhabitants. They live in 11 core cities - three of them (Dortmund, Duisburg, Essen) with 500,000 to 600,000 inhabitants - and an outer zone comprising 4 administrative districts, which contain another 42 municipalities (RVR 2007b). Thus, the Ruhr area is the largest urban agglomeration in Germany, and, in combination with the area around the adjacent Rhinefront cities of Dusseldorf, Cologne and Bonn, one of the largest conurbations in Europe (with about 11 Million inhabitants).

The regional economic structure of the Ruhr was dominated by coal mining, steel production and metal processing for over a century. Structural transformation, forced by the downturn of the traditional industries since the 1950s, has provided a base for the emergence of knowledge-intensive and service industries (Butzin et al. 2006). However, not all cities, and therein not all localities, have been able to cope with structural change equally successfully. In the 1980s and

1990s, especially the neighbourhoods adjacent to the abandoned industrial sites and coal mines were characterised by industrial, commercial and overall urban blight. Today, the Ruhr area is, therefore, characterised by a considerable degree of intra-regional disparities. Therefore, from a macroeconomic point of view it is quite fair to say that the Ruhr area is still a “problem child” with respect to the unemployment rate or the share of recipients of social benefits (figure 2), even though it has now adapted to overall NRW levels in terms of overall economic growth.

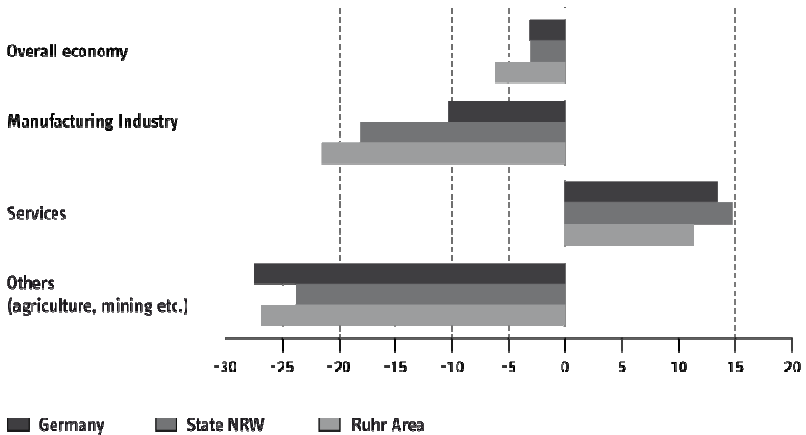
Figure 2
Germany and the Ruhr Area: Location and demographic indicators (2008)



Quellen: Federal Statistical Office

The dramatic economic change of the Ruhr industrial district is outlined by the following figures: In 1970, 42% of all employees in the Ruhr district worked in the service sector, in 2006 around 70% on average and 78% in the city of Essen (Steinberg 1978; LDS NRW 2007). Figure 3 shows that the process of structural transformation has not come to end until recently. Between 1998 and 2006 the share of employees in the manufacturing industry declined by about 23% in the Ruhr area, while the average for Germany is just about 11%. In contrast, the number of employees in the service sector grew at a comparatively moderate rate of about 12%.

Figure 3
Employees in the German economy –structural change between 1998 and 2006 (in %)



Source: Own calculations based on Federal Employment Agency. For absolute values see in appendix table A-1

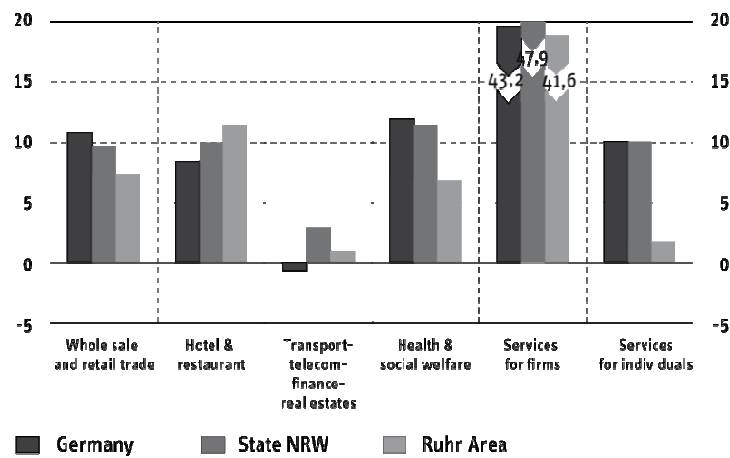
Figure 4 shows an interesting growth pattern with respect to the service sector. With respect to the growth of employment in different segments of the service sector, the Ruhr area is nearly always behind Germany or the state of NRW as a whole.

It can be interpreted that the interwoven processes of declining manufacturing industry and mining, growing unemployment and just a very moderate growth of private income, cause a comparatively moderate demand for goods and services in the private and business sphere.

But there seems to be one exception. The hotel and restaurant industry in the Ruhr area shows an above-average growth in employment (nearly 12%) compared to Germany (8%) and NRW (10%). This might be seen as a first hint for the successful development of tourism as a new service sector in an old industrialized region.

Figure 4

Employees in the German service sector – structural change between 1998 and 2006 (in %),



Source: Own calculations based on Federal Employment Agency. For absolute values see in appendix table A-2.

4.2. Tourism development in the Ruhr Area: Milestones, policies and stakeholders

Due to the everlasting economic and political change in the Ruhr area, a lot of progress has been made in the fields of cooperation of cities, lobbyists public and para-governmental enterprises and associations. Many of these stakeholders share a great interest in tourism and support strongly the quest to build up the regional tourism and the necessary infrastructures.

The economic base on which a multifaceted city tourism in the Ruhr area can now emerge, was established with success during the past five decades (see figure 1). The agglomeration now hosts 4 universities, 8 universities of applied science and 1 school of arts. Further, 5 opera and ballet companies, 6 orchestras, 8 theatres and 2 musical theatres are located in the region as well as around 150 public museums and galleries, 30 public socio-cultural centres and another 175 private art galleries and 150 private free theatre groups (RVR 2007b).

Furthermore, the preconditions for the establishment of a tourism sector based on industrial heritage were founded by the International Building Exhibition (IBA) Emscher Park. This 10 year-programme (1989-1999) was launched by the NRW state government and focused on a sub-region of the Ruhr area, which had been mostly affected by the hectic and disparate processes of industrialisation during the last decades of the 19th century and the decline of the coal, iron and steel industry since the 1950s. The IBA programme aimed at fostering urban economic, social and ecological restructuring of these old industrialised areas (Danielzyk & Wood 1993). Therefore, a planning company was formed by the government of NRW. This company initiated about 120 single projects, including the protection and conservation of industrial heritage sites (Ganser 1993, Fuchs 1999).

The IBA bypassed the existing political and planning system, since the projects themselves were initiated by local networks consisting of representatives of different municipal authorities, business associations, firms, citizens' initiatives and national and international experts in planning and architecture. The most promising projects were chosen by a competitive process. Local authorities and related non-state actors were entirely responsible for these projects (Fürst &

Kilper 1995, Danielzyk & Wood 2004, Knapp et al. 2006). In this way the NRW government initiated a regional governance process, which among other things laid the foundation for a set of tourist attractions. These are unique characteristics of the Ruhr area and, therefore, important regional assets in a highly competitive tourism market.

The outcome of these governance processes was taken up by the "Master Plan: Tourism in the Ruhr Area" of the NRW state government (MWMTV 1997). In accordance, the Ruhr Regional Development Association (RVR) started to campaign for an Industrial Heritage Route in 1999 (Budde/Heckmann 2000). This route links the different sites applicable to industrial heritage tourism. Altogether, the route consists of 52 sites, including 6 museums, 9 lookout points, 12 traditional settlements built for industrial workers, and 3 visitor centres (incl. Essen - Zollverein area; figure 5). In the year 2001 the building complex of the former "Zollverein" coal mine became enlisted by the UNESCO as a World Heritage Memorial.

Apart from the establishment of industrial heritage attractions tourism in the region received some boost through new musical theatres, a large indoor sport stadiums and entertainment arenas for more than 10,000 visitors, shopping centres, attached hotels and theme parks (Warner Bros. Movie Park; cf. Juchelka 1998). In the cultural field, new concert halls for classical music have been opened in Dortmund and Essen since the year 2000. Finally, in 2006 the Ruhr area - with Essen as central location - was nominated as European Capital of Culture 2010.

In this context a subsidiary public organization was founded in 1998 (Ruhrgebiet Tourismus GmbH & Co KG - RTG) under the umbrella of the RVR. This regional tourism board manages the establishment of the tourism infrastructure and the marketing of the Route of Industrial Heritage according to the Master Plan (figure 5 top). The RTG is owned by the RVR, the marketing corporations of the big cities and firms from the fields of event management and tourism of the Ruhr area.

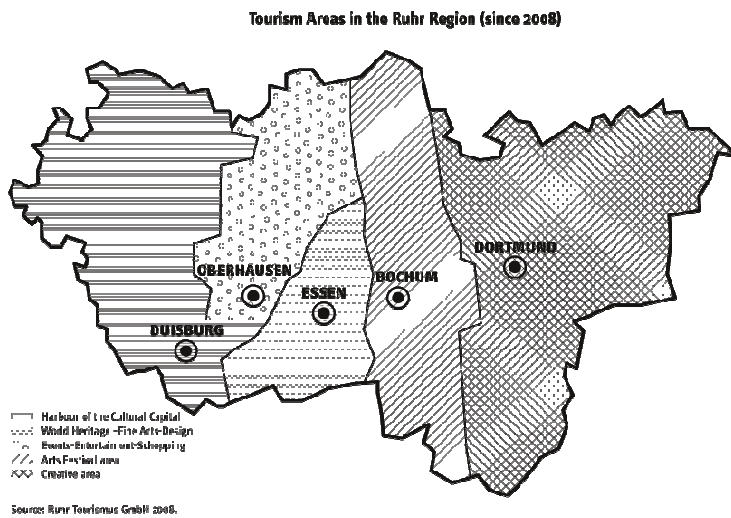
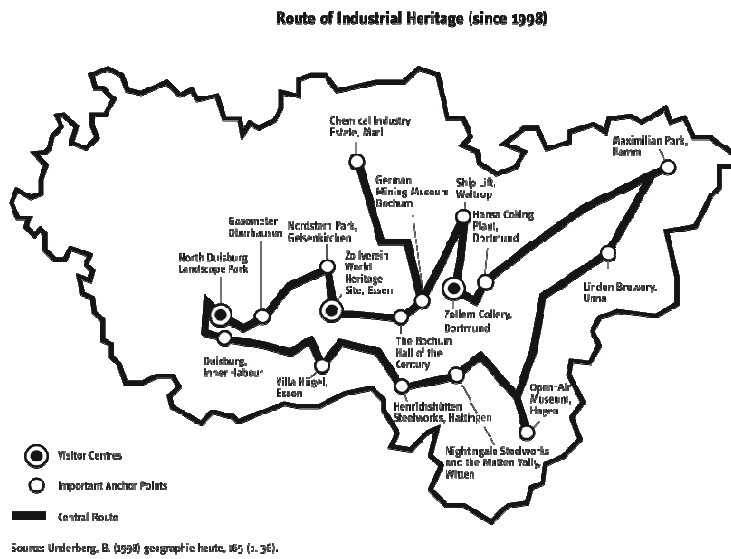
Moreover, the regional tourist board RTG conducts feasibility studies for selected municipalities in order to point out further demand for urban renewal around the industrial heritage sites. As a result, new segments of tourism in addition to the industrial heritage were identified, do have some success and could be further promoted. Health tourism, cultural tourism, sports and shopping tourism are the most important fields. The Ruhr area covers the majority of shopping centers by number and retail space in Germany. Especially the urban entertainment center CentrO in Oberhausen with its shops, restaurants, cinema, theatre, harbour and other amenities has created a vibrant image of the region and the area attracts several millions of visitors every year.

Since 2008 the RTG has aimed to further develop their strategy to promote tourism in the Ruhr area. It follows a philosophy which is laid down in a new "Master Plan: Tourism in North Rhine - Westphalia" (Tourismus NRW e.V. 2008). The Ruhr area is now presented as a region with five segments, each of it addressing a particular focus group of potential visitors (see figure 5 below). For example the area around the city of Essen is presented under the label "World heritage - Fine Arts - Design", whereas the neighbouring area around Oberhausen stands for "Entertainment & Shopping" and the area of northern Duisburg combines sites of Industrial heritage with the natural landscapes of the lower valley of the river Rhine. Linked to these efforts the RTG conducts PR-campaigns for the region and selected events (art exhibitions, "Love Parade", European Capital of Culture 2010). The event year of 2010 provides the unique chance to present the whole agglomeration to interested visitors by guiding them through all parts of the area according to the new focus strategy of the RTG.

To sum up, the RTG regional tourism board fulfills four central functions (i) being a think tank for local and regional decision-makers, (ii) development and management of tourism infrastructure, (iii) marketing and, (iv) coordination of tourism activities at the regional level in the Ruhr area. But apart from these tasks, the RTG also acts as a normal service provider in the field of culture and tourism. Examples are the organization of individual events ("Nights of Industrial Culture", "RuhrTriennale" art festival), the direct sale of event tickets through a region wide ticketing system, arrangements for and sale of guided tours and accommodation through a region wide booking system ("packages"). Further, the RTG company runs the central visitors centre at important heritage sites where again remarkable sales are made with tickets, bookings, books and souvenirs. In these fields the RTG as regional public stakeholder cooperates closely with the publicly funded tourism and city marketing corporations of the cities and districts of the Ruhr area.

Thus, in important business fields the public organizations engage in activities in which they compete with private service providers. From the point of view of the municipalities represented by the RVR, the rationale behind engaging in profit-oriented activity is twofold. First of all it is an aim to reduce the share of public subsidies for the RTG and the local tourism and city marketing corporations via a growing income through direct profit making activities. Secondly the RTG has to raise funds in order to downsize their budget deficit which is rooted in wrong decisions of the state government in the beginning of the 2000s decade. The initial complete public funding of the RTG by the state NRW stopped suddenly after a few years, but the work load remained as well as the staff. Thus, whether desired or not, the RTG has to search for additional income sources in the field of cit tourism.

Figure 5
Concepts for Tourism in the Ruhr Area



As a result, a highly competitive environment developed for the small number of about 7 to 10 private firms, which are focusing on special offers at the interface of culture, event and industrial heritage tourism. The concept of these small firms – employing mainly 2 to 10 persons - is based on the offer of package tours with accommodation, guides and ticket sales. Moreover, there is a large number of estimated 100 freelancers in the region, who work as tour guides. Just like a large number of small hotels and micro-firms in the field of “bed & breakfast” they are very much dependent on the success of the private service providers .

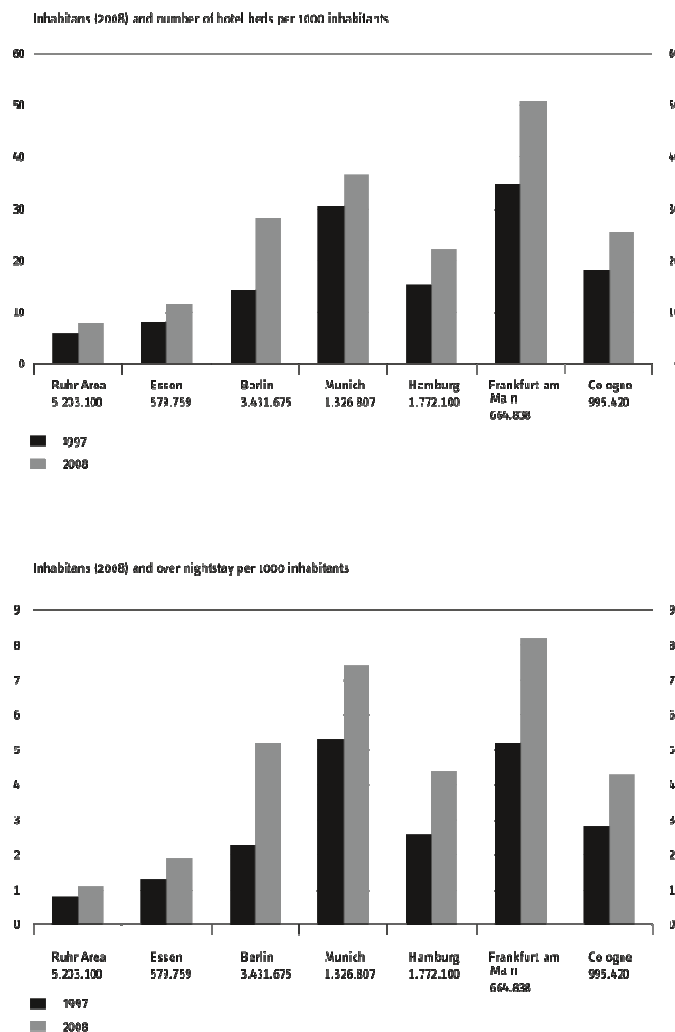
4.3. Accommodation facilities in comparison

As noted above (section 2) the nomination of the Ruhr area as European Capital of Culture 2010 can only be seen as one of several impulses to foster the tourism in one of the largest old industrialized regions of Europe. However statistical data show that there is still a long way to go, until the Ruhr area becomes a really important player in city tourism in Germany. For example, with respect to the number of hotel beds and overnight stays per 1,000 inhabitants the Ruhr area and its main important tourism centre – the city of Essen – show very low rates in comparison to other important cities and agglomerations in Germany (figure 6).

Moreover, it is a striking feature that the growth in number of hotel beds and overnight stays per 1,000 inhabitants between 1997 and 2008 is much stronger in the other cities and agglomerations than the Ruhr area or Essen. Thus, the

gap widens further. With respect to the total number of beds - in hotels with more than 20 beds - the Ruhr area (5.3 Mill inhabitants) hosts 41,000 hotel beds while Berlin (3.4 Mill. Inhabitants) had 97,000 beds in 2008 (appendix table A-3).

Figure 6
Development of tourism in German cities and in the Ruhr area, 1997 to 2008



Source: STIWA 2009. The data are related to hotels with 20 or more beds.

Another problem is the comparatively moderate performance of the Ruhr area as whole with respect to the utilization of existing hotel beds (below 40% throughout 1997 to 2008). In contrast the hotel industry of the city of Essen performs better and reaches the level of cities like Frankfurt and Cologne. However, the temporal pattern of figure 7 shows that the urban areas outside of NRW (see figure 1) show a steady growing rate of capacity utilization between 1997 and 2008. In contrast, the tourism industry in Cologne, Essen and the Ruhr area seems to be quite sensitive towards cyclical effects (e.g. in 2003). One explanation might be the strong dependence on business tourism, i.e. visiting fairs, conferences and conducting business trips to the headquarters of large companies.

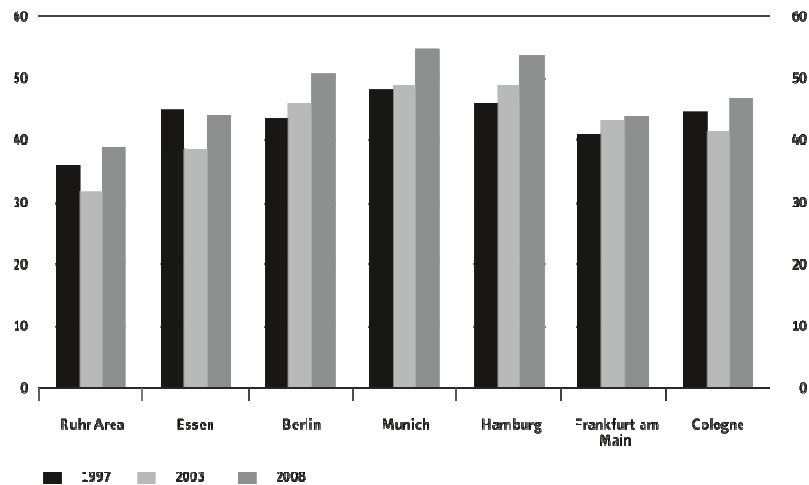
We conclude that the Ruhr area has observed some growth in key industries, in science and the service sector, the tourism industry has not developed to the level it would be adequate for an urban agglomeration like the Ruhr. This applies especially for start ups and the hotel industry, which is relatively underdeveloped. In other sectors, the dynamics of start ups are stronger and it is clear that the priorities of both public and private stakeholders and associations are clearly biased towards the promotion of traditional or classical start ups in other service sectors or the industry.

Furthermore, it has to be pointed out that the average ratio of start ups in the West German comparison is lower. This opens up the question if a region which does not have many traditions in the tourist industry should focus on tourism development as a top priority. The risk of failure in the tourist industry appears significantly higher than in other industries, especially those, where an existing network, partners, relations, contacts and traditions exist. Since the "start up culture" and the entrepreneurship are lower than in many other parts of the country, problems could arise.

Nevertheless, given the quite successful start and the steps that have been taken, especially the swing of the nomination as European Capital of Culture 2010 gives some thrust to the development.

Figure 7

Development of capacity utilization in selected German cities and in the Ruhr area, 1997 to 2008



Source: STIWA 2009. The data are related to hotels with 20 or more beds.

5. Tourism in Essen: Role and position of SMEs & entrepreneurs

5.1. Tourism policy in the context of urban renewal

As part of the Ruhr, the economy of Essen has had to undergo a rigorous transformation within the past four decades. The last coal mines closed during the 1980s and a huge coking plant in the early 1990s. Yet, the city has traditionally been one of the key office locations of the Ruhr region. The headquarters of some of the largest German enterprises are located here (power industry, steel and engineering, retail trade).

Furthermore, the city has become an internationally renowned place of commercial fairs, conferences, and is a university location. Essen hosts widely acknowledged cultural institutions, e.g. the Folkwang School of Arts, museums and galleries, the opera house, and a new concert hall, theatres and a musical hall. The Cinema hall "Lichtburg" is an architectural memorial where all new German films now have their world premiere. Finally, in the year 2002 the building complex of the former "Zollverein" coal mine & coking plant became enlisted by the UNESCO as a World Heritage Memorial. This was the most important precondition in order to get the nomination as Europeans Capital of Culture 2010.

Thus, with respect to city tourism Essen has certain strongholds (figure 8). Due to the university with a very renowned medical faculty, the large headquarter locations and the exhibition and conference centre tourism in Essen is traditionally based on business tourism in a wider sense.

With respect to culture and events, we have already sketched out that Essen has been developed steadily into a cultural centre of national importance. Opera house, concert hall and the theaters are continuously winners of awards of different national competitions.

Furthermore, the development of inner city shopping facilities since the year 2000 provides another impetus to the development of city tourism. Since Essen is the headquarter of the large department store chain "Karstadt", in the year 2009 the firm opened the nowadays largest inner city shopping mall in Germany as their "flagship".

However, the main important "ingredient" in the Essen concept of multifaceted city tourism is its industrial heritage. This comprises the former sites of manufacturing firms (e.g. Krupp), coal mines and coking plants (e.g. the Zollverein complex, figure 9) as well as different types of residential quarters in a "garden city" fashion. With respect to UNESCO World heritage sites - industrial heritage - the city of Essen now competes with 24 destinations in 11 countries on three continents (see appendix table A-4).

Figure 8
Elements of city tourism in Essen



Source: Own depiction

The biggest advantage of Essen in comparison with other cities in this respect is the central location of the heritage sites (figure 10). With public transport facilities (3 to 6 times in an hour) a visitor needs 15 to 30 minutes at most from the UNESCO site to reach the city centre with all shopping, culture and business locations. Moreover, the important tourism spots in neighbouring cities of the Ruhr area can be reached within 30 to 90 minutes by regular public transport. Industrial heritage sites in the UK for example, are not so closely linked to cities with a broad range of different offers for tourists.

Figure 9
UNESCO World Heritage Memorial "Zollverein"



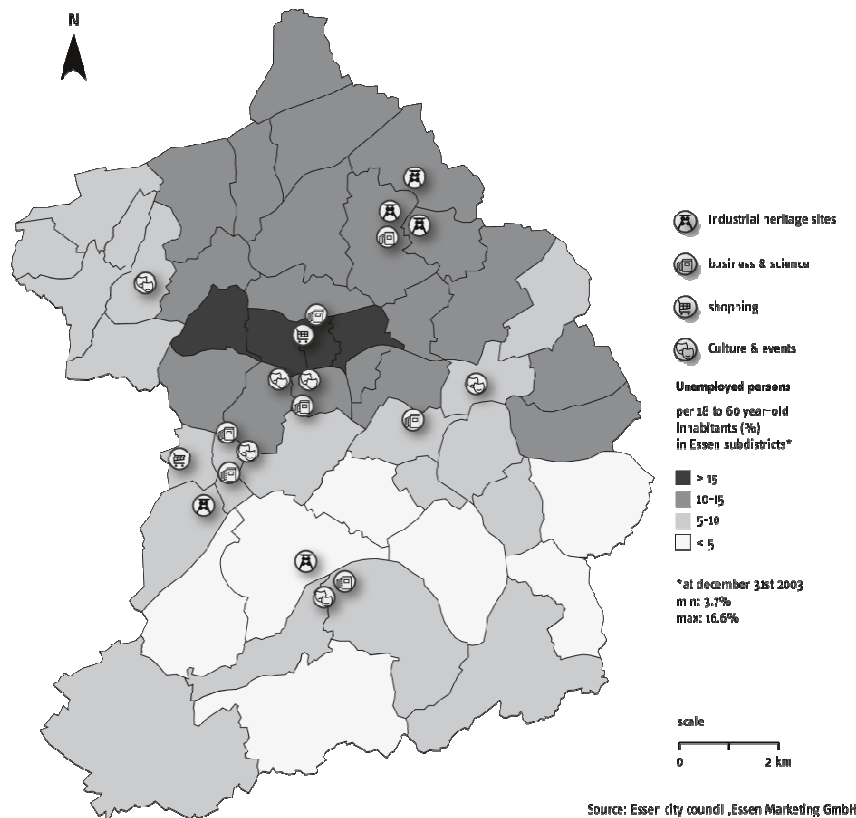
Source: Entwicklungsgesellschaft Zollverein mbH (2006). Zollverein Magazin 31/8. Essen.

The other side of the coin is the social distance (figure 10). In Essen – like in all cities of the Ruhr area – the Industrial heritage sites are surrounded by low quality living quarters which were a destination also for a large number of

immigrants up to the 1990s. They entered into the areas in search for jobs and housing facilities or as refugees. At large these areas were characterized by uncomfortable housing and environmental conditions up to the 1990s. In the course of the industrial downturn and due to redevelopment measures the environmental situation improved, but socioeconomic conditions deteriorated. Unemployment and the share of recipients of social benefits are well above the cities' respective averages (figure 10). In turn private household incomes and the general educational level are low. Moreover, in the 1970s a selective out-migration process set in, which left low-educated persons and poorer families as dominant groups in the areas. Industrial blight and selective migration caused a decline in local purchasing power. As a result many firms in the retail and consumer service trades closed down. This in turn further reinforced emigration from these areas.

Figure 10

Important locations of city tourism in Essen: Spatial proximity and social distance



In the context of the above mentioned International Building Exhibition – IBA Emscher Park and the establishment of the Industrial Heritage Route (see section 4.2 and figure 5) a process of comprehensive urban renewal took place in these city districts, in particular in the north-eastern part of Essen. By starting to redevelop the industrial heritage site of Zollverein, which is a central location of the European Capital of Culture program, it also helped to lay the foundation of a newly-established tourism sector in this old industrialized part of the city. Between 1993 and 2004 about € 45 Million were invested in the redevelopment of the north eastern part of Essen by the “Socially Integrative City” program of North Rhine-Westphalia. This state-funded neighbourhood-oriented renewal program is concerned with the revitalization of old industrialized urban areas in NRW.

It must be noted that immediately after the closure of the “Zollverein” coal mine in 1986, several organisations started initiatives to counteract the blight phenomena in the area. Examples include the municipal planning department and the municipal agency of business development, the faculty of social work of Duisburg-Essen University, as well as a local business association. In the Socially Integrative City programme, a half-yearly citizens’ conference proves to be the most prominent forum in which state and non-state actors discuss development issues. To prepare and promote this conference, the local business association asks for proposals of local citizens, runs the related Website and keeps close contact with the local media. In this forum the following ideas were developed since the End of the 1990s:

- conservation of the Zollverein area (coal mine and coking plant) as a part of the IBA-program (figure 10),
- development of the site as a new centre for business and cultural activities through a trust organisation, and

- foundation of a local association in order to establish a tourist industry in the districts surrounding the industrial heritage site.

Between 1989 and 2007, in the context of IBA, the Socially Integrative City program and other regional development programs at least 200 Mill. € were invested in the conservation of the memorial area itself. The nomination of the Zollverein area as UNESCO World Heritage Memorial in 2002 initiated a further boost. The reconstruction work was managed by a public development agency. Nowadays the site hosts the following attractions:

- museum on industrial work and lifestyle in the Ruhr area (RuhrMuseum)
- Design Museum
- Design Faculty of the Essen Folkwang School of Arts
- conference centre, theatre, exhibition and event halls
- workshops for artists, designer studios
- central visitors centre of the Industrial Heritage Route
- ticket and booking counter for other cultural and tourism activities
- restaurants
- workspace for the local Tourist Association “ZollvereinTouristik” (see below).

In 2008 the so-called “Zollverein Trust” took over responsibility for the land use of large parts of the memorial complex and for the cultural and tourist trade activities. The trust itself was founded in 1998. Its board consists of representatives of the municipal and state authorities, cultural institutions, large firms, and political parties. The trust itself rents out space to other organizations and firms, which run cultural, tourism and business activities. To a smaller extent the trust also arranges classical concerts and exhibitions. Multilingual tourist guides for the memorial complex are trained by the trust. They work as freelancers in cooperation with the visitor centre and booking counter of the Industrial Heritage Route which is carried by the regional public tourist organization RTG (see part 4.2).

Due to the nomination as a UNESCO world heritage and related publicity through media public interest and number of visitors to Zollverein have been growing steadily (from 30,000 in 2000 to 840,000 in 2009). To raise and maintain public acceptance in the locality, the trust links with initiatives of local citizens, business networks, cultural and social institutions of the city. These activities include joint music and theatre workshops in local schools, local festivals, art exhibitions, image campaigns and engagement of social street workers for the adjacent neighbourhoods.

At about the same time as the trust a local tourist association was founded by citizens and small businesses of the quarters adjacent to the Zollverein memorial complex. As part of the “Socially Integrative City”-programme the association received public support between 2000 and 2004 in order to develop the ZollvereinTouristik agency. This agency now offers authentic guided tours around the old industrialized city districts and bed & breakfast accommodation. Government funds were provided for a part-time manager of the Essen Marketing Inc. (EMI) in order to arrange courses in management training and foreign languages for 30 landladies (who are all over 50 years old and have a non-academic background). The EMI has also started to promote the offers of ZollvereinTouristik as a unique selling point of the city.

In the context of the “Socially Integrative City”-programme, the initiative to establish a local tourist sector was linked with other urban renewal schemes in the respective neighbourhoods. A first boost to local tourism was given by the cooperation with firms from a new business incubator at the Zollverein complex, currently hosting 80 firms with 500 employees. For a number of years, firms from the incubator have been arranging accommodation for seminar guests via ZollvereinTouristik.

Since 2005, ZollvereinTouristik has been operating without public subsidies. New projects to achieve further growth include

- catering with regional gastronomic specialities at conferences and cultural events,
- cooperation with hotels in adjacent parts of Essen in combination with tour package offers for larger groups (booking against commission),
- joint offers for guided tours with a specialized travel agent (target groups: students and scholars of architecture and planning)

Further projects are planned like

- full-time catering in the building of the Design Faculty,
- arrangement of long-term accommodation for students,
- establishment of a Quality Management Group to enhance the quality of the associated accommodations in Essen and to certify similar accommodation facilities in other tourist centres of the Ruhr area.

5.2. Development of accommodation facilities in Essen

Our empirical analyses provided indications that the context-specific regional and local tourism policy has helped to foster tourism, i.e. the hotel and bed & breakfast business. Table 2 shows that in Essen the overall number of hotels grew steadily from 26 to 68 between 1990 and 2009.

Table 2

Development of hotel capacities and size structure in Essen

year	Size class (number of rooms)					total
	upto 20	21 - 40	41 - 60	61 - 80	81 and more	
hotels						
1990	6	11	3	2	4	26
1995	13	14	4	2	6	39
2001	16	15	4	3	8	46
2009	23	21	8	3	13	68
share in %						
1990	23,1	42,3	11,5	7,7	15,4	100,0
1995	33,3	35,9	10,3	5,1	15,4	100,0
2001	34,8	32,6	8,7	6,5	17,4	100,0
2009	33,8	30,9	11,8	4,4	19,1	100,0

Source: Own calculation based on the databank of the Essen Chamber of Commerce

Remarkably the number of small hotels up to 20 rooms nearly quadrupled in twenty years and the number large hotels tripled. The development of medium sized hotels was overall positive. The number of smaller medium sized hotels (21 to 60 rooms) doubled all in all. But the group of large medium sized hotels – 61 to 80 rooms – could not gain much.

Thus, small entities – often at the lower end of the quality range – and large hotels with overall very high quality standards have gained ground since the year 1990. Thereby the size structure of the hotel business changed. While in 1990 the share of small hotels was not even 25 %, it was around one third in 2009. The share of large hotels grew from 15% to 19%. In contrast the group of medium sized hotels lost importance, since the overall share declined from 62% (1990) to 47% (2009).

Figure 11 (left) shows related spatial patterns. The first important finding is, the typical clustering of hotels in the central business district, i.e. the areas called city centre and inner city south with altogether 47 hotels out of 68. The city centre itself is dominated by the large hotels while the adjacent area is dominated by (smaller) medium sized hotels. In the southern part of Essen as well as in the old industrialized North, East and West (N-E-W) of the city the structure is dominated by small and (smaller) medium sized hotels.

Considering the temporal development of the hotel stock we find the highest dynamic in the N-E-W area of Essen as well as in the inner city south after 1996 and 2001 respectively. Taken together all these findings one can conclude that there was an overall positive development in the hotel industry. Smaller entities could win in importance. It seems that the nomination of the Zollverein complex by the UNESCO as World heritage in 2001 and of Essen 7 the Ruhr area as capital of Culture in 2006 gave an additional boost to the overall positive development.

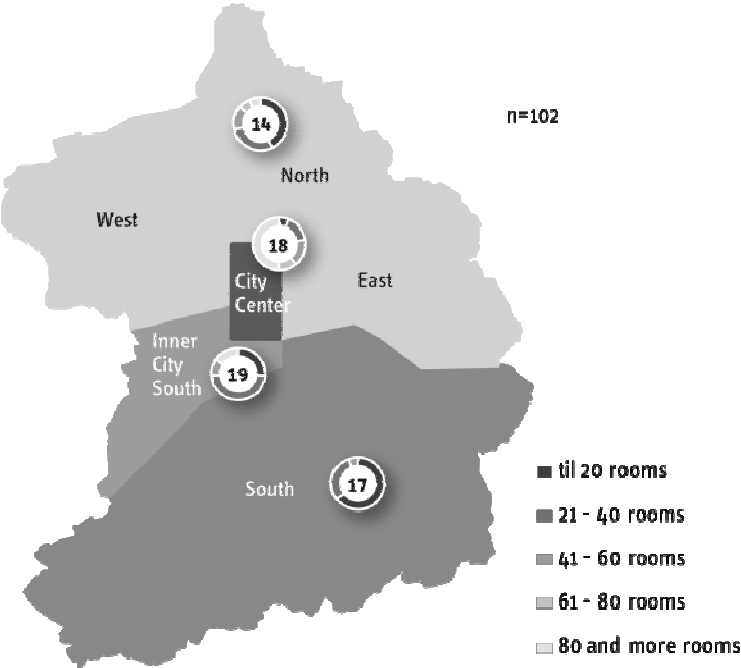
With respect to Bed & Breakfast facilities (B&B) we find additional hints at positive effects. We traced 102 entrepreneurs who offer accommodation to tourists in small guest houses or guest rooms within their own house. Based on our in-depth interviews with individual entrepreneurs and experts in tourism and urban development we assume that at least two thirds of them started their business after the year 2001. Moreover, we find a spatial distribution pattern which differs much from the location pattern of hotels. B&B facilities are mainly offered in the N-E-W region of Essen (altogether 60% of 102 entities). Therein, most of the offerings are from the northern part of Essen (in total 32 %, figure 12), close to the Industrial heritage sites.

Our personal short telephone interviews with B&B micro firms revealed that out of 62 respondents 84% started their business in 2002 or later, after the nomination of the Zollverein complex as UNESCO World heritage Memorial. The ratio for the Northern, Eastern and Western part of the city together is about 86%. In other words: The “boom” of micro firms

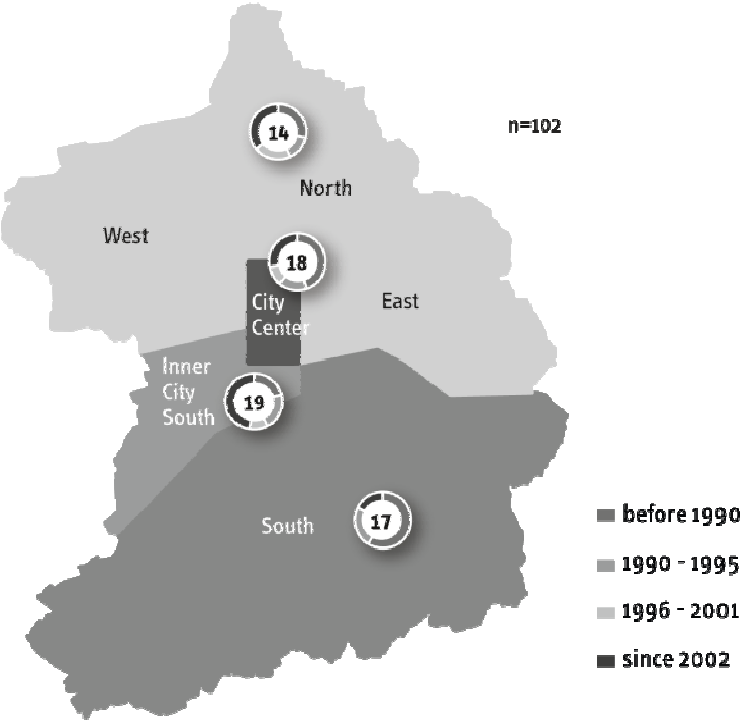
in the hospitality sector set in after a very specific touristic highlight could be established and the immediate area around the heritage site was the arena in which the boom took place (cf. figure 12).

Figure 11
Spatial patterns of hotel locations in Essen

1. Distribution of hotels according to size

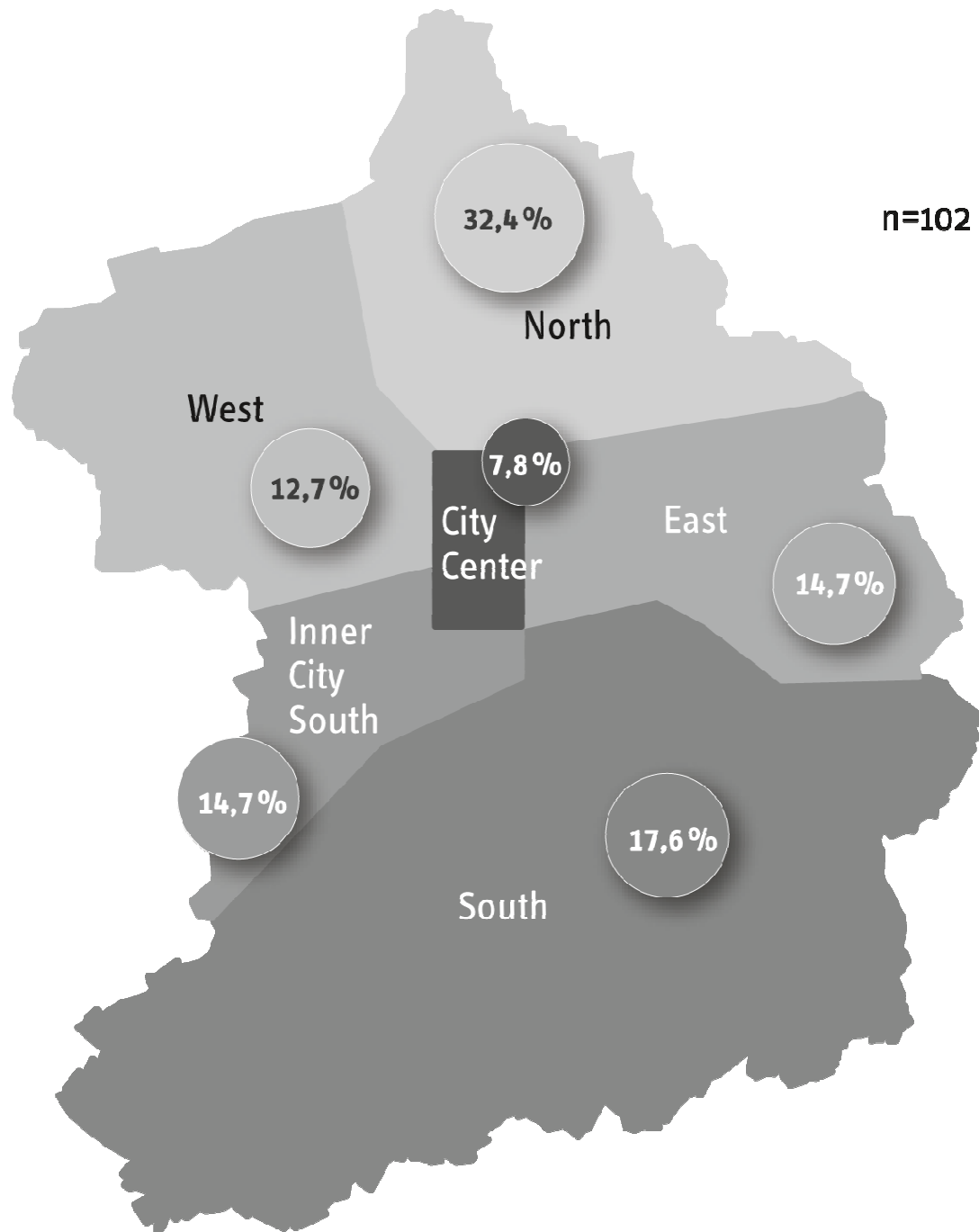


2. Distribution of hotels according to time of opening



Source: Own depiction. Calculation based on the databank of the Essen Chamber of Commerce

Figure 12
Spatial patterns of Bed & Breakfast facilities in Essen, 2009



Source: Own depiction. Calculation based on the databank of the Essen Chamber of Commerce

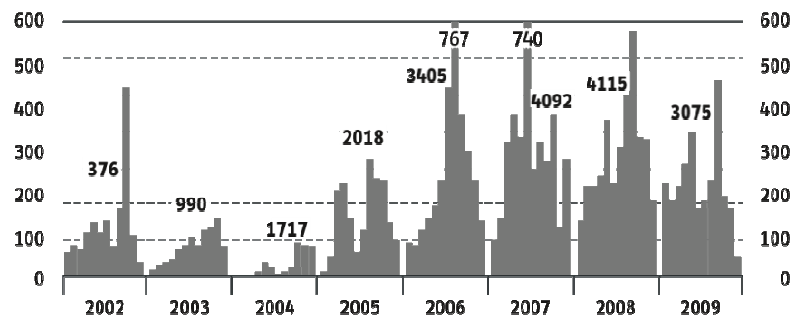
As described above, the B&B entrepreneurs of the N-E-W part of Essen formed a local tourist association (ZollvereinTouristik) in order to participate in the interwoven processes of urban restructuring and tourism development in the old industrialized parts of Essen. The number of overnight stays arranged by ZollvereinTouristik rose from nearly 1,000 in 2003 up to 4,100 in 2008 (figure 13). From the actual figures dated May 2010 we estimate that this year around 4,500 overnight stays will be in total conceived by ZollvereinTouristik.

Through the placement of overnight guests an estimated annual turnover of around 250,000 € was generated in 2008 against 60,000 € in 2003. From 1,930 guests altogether in 2006 the share of international guests was 14%, while 60%

came from German regions outside of NRW (Zollverein Tourism Assoc. 2007). These figures do not include the growing number of recurring guests who book directly via the landlords.

Figure 13

Development of overnight stay conceived by the Zollverein tourism assoc. 2002 to 2008



Source: Zollverein Tourism Assoc. 2009

Our study revealed, that B&B bookings in the N-E-W part of Essen very much depend on the success in selling package tours to tourist groups by the local association ZollvereinTouristik. If required and possible the local association is also creating arrangements where hotels and B&B providers are included.

5.3. Stakeholders in tourism in Essen: cooperation and frictions

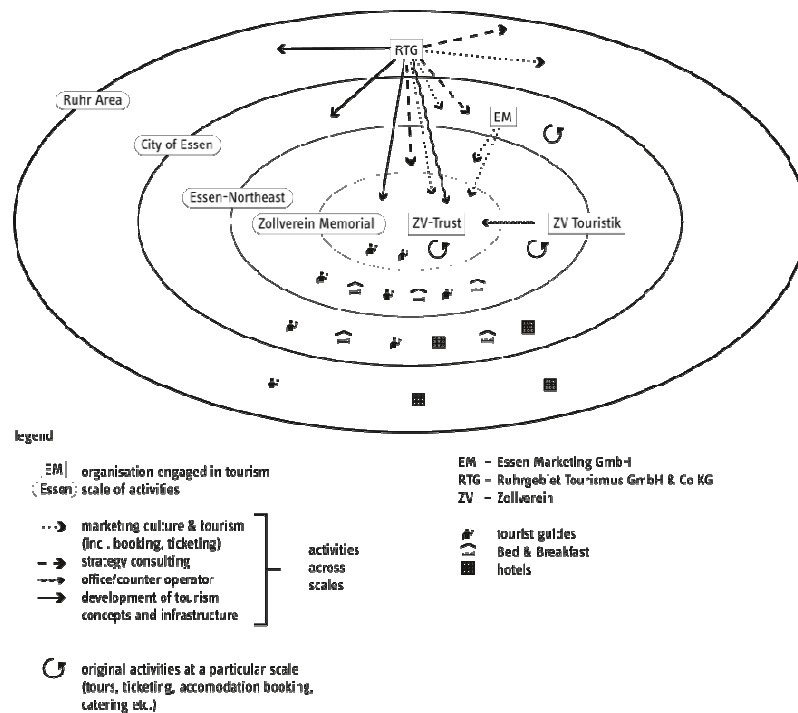
At a first glance it seems that in Essen and the Ruhr the tourist industry, including micro firms, has passed through a successful starting period since the middle of the 1990s. Nevertheless, successful governance at the intertwined regional and local scale is required to ensure long-term prosperity of the newly emerging city tourism. Taken the city of Essen as an example the development process is characterized by five important public and private stakeholders and interest groups respectively. They operate on different scales and fulfill the following functions (figure 14):

- regional tourism board (RTG):
- development and management of the industrial heritage route and the segment specific marketing of destinations,
- organizing single events
- As a tenant of the Zollverein Trust this semi-public company runs the central visitor center at the memorial complex, arranges feasibility studies for the prospective development of the city district around Zollverein and advises the Zollverein Trust with respect to programmatic aspects of site development.
- Souvenir and ticket selling, booking of accommodation and package tours
- Essen Marketing GmbH (EM): promotion of industrial heritage sites in the general marketing strategy for Essen (supported by the chamber of commerce and trade associations)
- ZollvereinTrust: arrangement of guided tours within the memorial and general responsibility for usage of the heritage site and the new RuhrMuseum,
- local ZollvereinTouristik association: arrangement of guided tours outside the memorial but within the near vicinity in Essen, provision and booking of accommodations (hotels, B&B facilities), catering
- private firms and entrepreneurs running hotels, bed & breakfast facilities or working as tour guides.

Especially the RTG regional tourism board plays very different roles at the same time. Currently, there are good arguments in favour of a relatively centralized marketing of the Ruhr tourist attractions and related sales. To fulfill its role as a leading, internationally acknowledged tourist attraction, the UNESCO memorial and other heritage sites require a professional system of information, marketing and ticketing. As tourism is still not fully established as an economic strength of this region, at the moment a regional management is needed to attract investors for future high-ranking “anchor points” in the hotel and restaurant industry.

However, frictions appear when the subsidized RTG enters the market for tickets, accommodation bookings, selling of guided tours and packages. Micro firms in the B&B segment gain from those package tours sold by private tourist companies, while large hotels tend to gain from package selling by the RTG.

Figure 14
 Stakeholders in Essen city tourism (culture & event, industrial heritage)



Own depiction.

At this point the representatives of the private (small) businesses argue, that such type of publicly funded intervention should only take place where and when private initiatives do not emerge. The state should withdraw when private economic activities start to flourish.

In the context of tourism in the Ruhr area and in Essen this would imply

- the withdrawal of the semi-public RTG company as a service provider, at least at the local scale,
- the entrance of private tourist companies in the respective fields,
- focussing of the RTG on strategy development for the heritage site and the surrounding city district.

However, these steps should only be taken "when the time is ripe", i.e. when private firms possess the required skills and resources to take up a more crucial position in the industrial heritage tourist sector.

6. Conclusions and implications for future development

With respect to our first research questions we can conclude that a bundle of policy measures have been conducted for around 15 years in order to foster tourism as a new service sector in the Ruhr area. Thereby, care was taken to use tourism development as a means to manage the overall processes of socio-economic transition and urban renewal. The existing potentials of unique offers in city tourism were analyzed by local decision-makers, who subsequently bundled measures into appropriate marketing concepts. Industrial heritage was identified as the most important unique feature in the competition amongst urban tourist destinations in Germany.

In accordance to scholars' findings on success factors and barriers to urban renewal and (industrial heritage) tourism development community participation played a very important role in the process of urban re-structuring and tourism development, in particular in Essen. As a result industrial heritage sites flourished and the region received internationally renowned nominations.

In this context the hotel industry grew at a remarkable rate during the past two decades. Micro firms in the B&B segment started their business mainly after the nomination of the Zollverein complex by the UNESCO. Further, small firms formed their own local tourist association in order to get their share from the young growing tourist industry. Nevertheless, further core investments like hotels and high-value and creative catering are necessary - in the more direct vicinity of the

industrial heritage attractions - and will also improve the quality of life of the local inhabitants and therefore give the region also more attractiveness for workforce, investors and families.

The RTG (semi-)public tourism development authority plays an important role in setting up the tourism infrastructure, coordinating activities region-wide and organizing big events and related marketing. However, due to financial pressure the RTG also enters markets which should be restricted to the private sector. Since the RTG uses a region wide network of public partners, they are a central competitor to small suppliers of services in tourism all over the region.

Representatives of private business fear that a consolidation of this constellation will restrict the business development of micro and small firms painfully. Scholars argue that tourism is not characterized by market failure, which would be an argument for public organizations to interfere. Instead it remains an important task for public and private organizations in the field of tourism promotion to empower and support start-ups in the hospitality sector, to improve infrastructure and logistics in particular, to conduct location marketing, to support the qualification of employees and managers, to aim at a stronger cooperation of both public authorities and businesses in the cities and the Ruhr region as a whole.

The new structure of the RTG regional tourism board and the work of the cities in tourism development have improved the situation but decreased the efficiency due activities like the creation of packages or marketing measures, which are not embedded in a regional context. Thus, the compilation of those local activities and the bundling of tasks under the body of the RTG has yet to be done. Some steps in this direction have been taken, also integrating the tourism industry and further players into the discussion process. This is even more important regarding the difficult financial situation of many of the cities in the region which strongly limits any activities in the area of promotion or tourism development.

Furthermore, concrete tasks for the near future are:

- growing flexibility of the tourism industry itself with respect to new offers and regional cooperation in order to attract more tourists, e.g. by creating linkages to the internationally renowned faculties of medicine at the Ruhr universities (international health tourism) or linking up city tourism in the Ruhr Area with wellness and sportive offers (Lower Rhine and Ruhr River cycle trails).
- improvement of a support system for smaller businesses and start ups organized by the Chambers of Commerce and other (semi-)public organizations, with a focus on consulting, qualification and lobbying.
- hosting of a greater number of large exhibitions for a broader public as permanent attraction pole in Essen and the Ruhr area,
- ongoing renewal of the neighbourhoods around the industrial heritage sites to provide a better environment for entrepreneurs in tourism, adjacent to the tourist spots.

Finally, in our opinion the Ruhr area should not compare itself too strongly with traditional tourist regions and try to catch up to them, but rather focus on its own strengths and chances and go its own way in order to become a more successful, attractive, competitive, innovative and - most importantly - unique tourist destination which then must be marketed.

Moreover, a gradual shift of attitudes within and outside of the region would be important in order to give more and sustained boost and add more budget to tourism, thus making it to a top priority in the region and for the key players. Moreover, a gradual mental shift is necessary. Many key players and lobbyists still try to stick to the past and the industrial roots of the cities and the region and in this regard do not seem to fully see the chances and opportunities of future development. In this regard, it could be helpful to loosen some of the historical ties.

Appendix

Table A-1

Employees in the German economy, 1998

	Germany	state NRW	Ruhr Area
Overall economy	27.207.804	5.736.900	1.558.555
Manufacturing industry	7.348.356	1.691.700	378.069
Services	13.119.468	2.828.402	792.086
Others (agriculture, mining etc.)	6.739.980	1.216.798	388.400

Source: Own calculations based on Federal Employment Agency.

Table A-2

Employees in the German service sector, 1998

	Germany	state NRW	Ruhr Area
Whole sale and retail trade	3.522.258	815.083	216.199
Hotel & restaurant	696.232	115.811	28.095
Transport /telecom/finance/real estates	3.253.824	664.352	184.170
health & social welfare	2.797.554	622.732	190.451
services for firms	2.168.327	467.444	133.864
services for individuals	681.273	142.980	39.307
Total	13.119.468	2.828.402	792.086

Source: Own calculations based on Federal Employment Agency.

Table A-3

Tourism in comparison in 2008

German cities and agglomerations	Hotel beds	overnight stay
Ruhr Area	41.227	5.981.141
Essen	6.702	1.078.299
Berlin	97.205	17.771.419
München	48.701	9.844.671
Hamburg	39.528	7.727.621
Frankfurt am Main	33.772	5.428.704
Cologne	25.373	4.308.701

Source: STIWA 2009. The data are related to hotels with 20 or more beds.

Table A-4

UNESCO World Heritage - 24 Monument with a focus on Industrial Heritage in 2009

(Partly combination of the categories Industrial Heritage, Architecture and Landscape)

Country	No. of Monuments	Monument
UK	7	<ul style="list-style-type: none"> – Industrial Historical Monument in the valley of Ironbridge, – Industrial Landscape Blaenavon, – Industrial Landscape Derwent Valley, – Mill-Village Saltaire, – Industrial Village New Lanark, – Cornwall und West-Devon Mining-Landshape – Pontcysyllte Aqueduct and Canal
Germany	3	<ul style="list-style-type: none"> – Zollverein Coal Mine Industrial Complex in Essen, – Frontiers of the Roman Empire, including the Roman Limes, – Völklingen Ironworks,
India	3	<ul style="list-style-type: none"> – Darjeeling Himalayan Railway, – Nilgiri Mountain Railway – Kalka-Shimla-Mountain-Railway
Chile	2	<ul style="list-style-type: none"> – Humberstone and Santa Laura Saltpeter Works, – Sewell Mining Town
Italy	2	<ul style="list-style-type: none"> – Exemplar Housing Settlement Crespi d'Adda, – Rhaetian Railway in the landscapes of Albula/Bernina
Sweden	2	<ul style="list-style-type: none"> – The Mining Area of the Great Copper Mountain in Falun, – Engelsberg Ironworks
Cuba	1	<ul style="list-style-type: none"> – Trinidad and the sugar refinery in the Valley de los Ingenios
Finland	1	<ul style="list-style-type: none"> – Verla Groundwood and Board Mill
France	1	<ul style="list-style-type: none"> – Canal du Midi
Japan	1	<ul style="list-style-type: none"> – Iwami Ginzan Silver Mine and its Cultural Landscape
Switzerland	1	<ul style="list-style-type: none"> – Rhaetian Railway in the landscapes of Albula/Bernina,

Source: <http://whc.unesco.org/en/list>

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