

Encouraging Willingness to Contribute, City Fortifications and their Conservation in the Mediterranean

Rand Eppich^a, José Luis García Grinda^b

Universidad Politécnica de Madrid, Madrid, Spain, ^arandeppich@gmail.com, ^bjl.ggrinda@upm.es

Abstract

City fortifications are a defining feature of many cities and their communities in the Mediterranean. They clearly delineate boundaries, provide circulations paths and encourage visitation. However, they are expensive to conserve and maintain. A visitor or user fee is one available option that can simultaneously generate revenue for conservation while restricting access to vulnerable areas.

Willingness to Pay is a term reflecting of the maximum amount that a visitor thinks an entry fee is worth. When combined with an Optimal Pricing Policy and Price Discrimination to segment visitors into those willing to pay more, profits can be maximized. Obtaining the optimal price and thus maximum profit is especially important for extensive, expensive and difficult to conserve cultural heritage sites such as city wall fortifications. Wall fortifications cannot usually be adapted to other self-sustainable financial (or even semi-sustainable) uses beyond visitation; thus funding options to offset costs for maintenance, conservation and management are limited. However, this is a sensitive subject given the cultural, scientific and educational values of such places. Fortifications belong to the public and should be easily available for their enjoyment, recreation and educational understanding of history. Given this contradiction it is extremely difficult to achieve a balance between seeking maximum profit while providing access. Therefore this paper explores an alternative – encouraging a Willingness to Contribute. Visitors are often willing to contribute or pay more especially if they know a percentage of their fee funds upkeep. The paper describes research into access prices and strategies (or lack thereof) to extract willing contributions at fortified cities throughout the Mediterranean including Famagusta, Rhodes, Dubrovnik, Valletta, Ávila, Jerusalem, Pamplona, Carcassonne, Elvas, Lucca and Acre.

Keywords: cultural heritage management, conservation, financial sustainability, willingness to contribute.

1. Introduction

1.1. Problem statement

City wall fortifications are expensive, extensive, difficult to maintain and conserve. Funding options are extremely limited and usually rely on the public coffers for their upkeep. Even though they are appreciated and highly regarded by residents and visitors alike; there are possibly many other as significant and less expensive cultural heritage sites competing for the same

limited funding. Often their conservation and maintenance is seen as a burden by local or regional authorities. This is evidenced by numerous visits to fortifications, their level of conservation, recent interviews and research.

However difficult to conserve and fund, fortifications are often a defining feature of walled cities and a key component in the identity of the communities within. They clearly define boundaries, restrict access yet provide peripheral

circulations paths, encompass open recreational spaces and contribute to tourism (Bruce, 1994). Therefore several questions arise:

Can a model be created to assist in their management, maintenance and conservation? Are there fortified cities that have implemented successful, balanced approaches to access and self-sustainable financial mechanisms that take full advantage this important resource?

This paper will explore these questions through a combination of secondary and primary research into established access pricing and management policies at fortified cities throughout the Mediterranean.

1.2. Pricing access policy

Creating a financially self-sustaining place or destination, including cultural heritage sites, is difficult but entirely possible. There are numerous proven examples from national parks, historic cathedrals and museums. Their successful approaches often rely, in part, on proven business methods and techniques (Candela, 2010).



Fig. 1- The walls of Famagusta as seen from the Ravelin / Land Gate in 1919 and in 2014. The fosse is rarely used or accessed (Eppich, 2014).

One such policy is extracting the maximum amount from a visitor, known as Willingness to

Pay (WTP). If the access price is set too low the site loses potential revenue and the reverse is also true, revenue is lost should a visitor value entry below an excessive entry price.

Therefore it is absolutely essential for a place to determine the optimum price point for visitor access. This is known as Optimal Pricing Policy (OPP) which maximizes profits by charging what the market will bear (Tuan, 2011). Determining this for cultural heritage sites is difficult and depends upon a number of factors including number of visitors, reputation of the site and management. It is often established by trial and error or based upon imperfect knowledge and frequently remains unchanged for decades (Mourato, 2004).

Because people are different and hold different values they are all willing to pay different amounts. This is known as Price Elasticity and plays an important part in establishing the OPP. It would be ideal to charge every individual a different price; but this is rarely practical.

Therefore, Price Discrimination separates visitors into groups such as foreign visitors, local residents, children or pensioners in order to charge different prices to each group and thus extracting additional revenue (Navrud, 2002). However, this practice is very controversial at cultural heritage sites given their educational values, visitors' sense of fairness and difficulties in implementation (Mourato, 2004).

1.3. Constraints

Implementing policies as Price Discrimination, restricting access through WTP and OPP for extracting maximum profit at many destinations would be straightforward. However, such practices at a cultural heritage site are difficult given the cultural, scientific and educational values associated with these places; values that often override economic considerations. Cultural heritage places such as city wall fortifications belong to the public and should be easily available for their enjoyment and education. Walls and the spaces around them are a public resource and should be experienced, enjoyed and visited.

In addition, the physical dimensions and layout of most city fortifications makes it nearly impossible to restrict or control access, a seemingly necessary requirement for extracting the maximum revenue.

2. Thesis

2.1. Balance

This presents managers responsible for the conservation of city fortifications with a dilemma. Leave fortifications open and depend upon meager public funds or restrict access and implement some type of Optimum Pricing Policy.

It is extremely difficult to achieve a balance between seeking maximum profits for conservation and maintenance while providing access to a public property. Therefore this research proposes the following thesis:

The concept of Willingness to Pay must be altered to encourage a Willingness to Contribute (WTC). This requires communication with the visitor, a strong connection between access price (contribution) and conservation with added value for the visitor. Preferably, WTC is offered at various levels for both intrinsic and extrinsic contribution opportunities, thus allowing visitors to self-select (price discrimination) for additional revenue.

It has been well established for many decades that visitors are often willing to donate or pay more especially if they know a percentage of their ticket price funds conservation (Willis, 1994). It has also been proven that visitors to cultural heritage sites often donate more given their level of education and concern for historic places. However, it seems that many fortified cities fail to enact policies to take advantage of this and visitors are often neither encouraged nor offered an easy way to contribute. Even when visitors contribute voluntarily they expect more in return beyond a well maintained monument. If managers of fortified cities could add more value they could possibly extract additional revenue to fund conservation. Ideally, this added value should be offered at various scales to further reinforce price discrimination. This paper

explores these issues seeking to support the thesis through investigation of access prices, price discrimination, added value and strategies (or lack thereof) to extract additional revenue at various fortified cities throughout the Mediterranean and how this correlates with a level of conservation.

2.2. Objective

The objective of this research is to assist decision makers and managers at fortified cities in crafting a strategy to establish a Willingness to Contribute policy. By presenting this research managers could learn from other cities facing similar issues and their approaches. They could then adopt their good practice and incorporate management and policy changes.

3. Research

3.1. Methodology

The research methodology employed to support the thesis was approached from a pragmatic perspective as these sites are widely dispersed, financial data is sensitive and statistics unevenly collected, questionable or not available. An extensive visitor survey was not conducted as it was beyond the resources available for this study (but remains for future research). While such a survey may have contributed it was not deemed time or cost effective at this point.

Initial investigations relied on secondary sources: previous collective projects on fortified cities, academic articles, guidebooks, city webpages, visitor blogs and estimations. Contacts were then made at each city for further research from primary sources: telephone interviews, questionnaires and emails. In addition, many of the sites are well known to the authors and information was collected on site.

A mixed methodology was used that including the collection of both quantitative and qualitative data to inform the study. This provided the means to integrate data from a variety of sources and perspectives. The quantitative research included statistics such as number of visitors, ticket prices and budgets (when available) and

this data was combined with interviews and visits for understanding the real life context. Data from these sources was integrated to draw on the strengths of each in order to answer the research question and support the thesis.

3.2. Research contribution from other sites

Limited research on other cultural heritage sites beyond fortified cities was also conducted. The focus was on places that have implemented some type of contribution pricing strategy with a connection to conservation. This included academic articles, proceedings and site visits. These sites included churches, city centres, museums and archaeological excavations.

3.3. Sites selection

Sites investigated were selected in order to obtain a representative and reasonable sample set of data. Sites from around the Mediterranean from multiple countries were selected because of their common as well as uncommon characteristics. Common characteristics included complete or nearly complete wall circuit, a level of significance eligible for or at near World Heritage site status with the concept that the fortifications are a defining and contributing part of the identity of the city. Uncommon characteristics included epoch and type of construction, physical dimensions, wide geographical disbursement, management structures and number of visitors. This last uncommon characteristic was important as it was necessary to determine if the thesis was viable for both high and low visitation. This was not a strictly random sampling, nevertheless, it is representative enough to achieve the objectives and draw reasonable conclusions.



Fig. 2- The walls of Ávila, above the walk on the ramparts with restricted paid access and below the open public space outside the walls (Almagro, 2007).

4. Defining Willingness to Contribute

Willingness to Contribute is an attempt to seek a balance between gaining maximum profit to fund conservation and providing fair access to cultural heritage. WTC can be further defined, enhanced and encouraged through the following:

- Augmenting WTP with information that informs the visitor as to the use of their fee for conservation. This information should be present at the point of payment, at work sites and upon exit. In addition, programmes could be created to allow the public to visit ongoing or future projects to inform them of the conservation processes. Willingness to Pay in Table 1 is defined as the current access price to major fortifications.

- Providing intrinsic opportunities to contribute. Intrinsic Opportunities represents the option for visitors to easily voluntarily contribute as they see the value of the place and its conservation – donation boxes, fund drives, annual contributions. Intrinsic motivations arise internally from the visitor and there is no apparent reward except for the act and joy of giving.

- Providing extrinsic opportunities to donate. Extrinsic Opportunities represents motives based upon a visitor's cost-benefit assessment. Visitors receive something tangible and external for their contribution such as a book, discount ticket, map, tax rebate, guide or recognition of their contribution in a list of donors. It is important

that this should be simultaneously combined with Intrinsic Opportunities as it is reasonable that additional revenue can be obtained from the same visitor by appealing to different motivations.

- Recurrent Opportunities is providing a reason for the local community to visit often. Adding value to the experience through activities, lectures, events and recreational use. Recurrent differs from extrinsic opportunities in that frequent non-tangible benefits are offered and frequently appeals to the local community.

- Creating opportunities for visitors to self-segment for voluntary Price Discrimination by offering various levels of access to different parts of the site at various times. Price Discrimination is any division of visitors for additional revenue and can be between foreign visitors, local residents, school children or pensioners.

- Building Membership associations is another way of enabling price discrimination while adding value, providing both intrinsic and extrinsic opportunities and special access privileges and recognition.

Location	Willingness To Pay €	Intrinsic Opportunities	Extrinsic Opportunities	Recurrent Opportunities	Price Discrimination	Membership	Conservation Communication	Optimum Pricing Policy	Willingness To Contribute	Notes
Rhodes, Greece	2 (seasonal)	no	no	yes	no	no	no	no	no	2
Famagusta, Cyprus	2 (limited)	no	no	no	no	no	no	no	no	1,3,4,5,6
Jerusalem, Israel	3,65	no	no	no	no	no	no	no	no	1,3
Dubrovnik, Croatia	11.66	yes	yes	yes	yes	no	yes	yes	yes	1,3
Valletta, Malta	0 10,00 (selected)	no	yes	no	yes	yes	yes	no	yes	1,3,4,5
Ávila, Spain	5,00	no	yes	no	no	no	no	no	no	1,3
Carcassonne, France	8,50	no	n/a	n/a	no	n/a	no	n/a	no	2,6
Elvas, Portugal	0	no	n/a	yes	n/a	n/a	n/a	n/a	no	2,6
Acre, Israel	0	no	no	no	no	no	no	no	no	1,3
Essaouira, Morocco	0	n/a	n/a	no	n/a	n/a	n/a	n/a	no	2,6
Pamplona, Spain	0 (selected)	no	yes	yes	no	no	yes	no	no	1,3,5
Lucca, Italy	0	no	yes	yes	no	no	no	no	no	1,3

Table 1- Indicators of policies related to a Willingness to Contribute are further defined below (Eppich).

Willingness to Contribute a combination of these concepts. It is not simply a relabeling of user fees but encouraging visitors and the community to become engaged in the upkeep and management of their inherited legacy. In the evaluation of existing policies it is a qualitative assessment from all collected information.

Seeking a balanced Optimum Pricing Policy is defined in Table 1 is a qualitative determination that combines collected data with comparative prices at local cultural sites, number of visitors, visitor distance traveled and other fortified cities in this study.

5. Conclusions

5.1. Summary of findings

To return to the original questions posed at the beginning of this paper:

Can a model be created to assist in maintenance and conservation? Yes, there are many examples of cultural heritage sites that managers of fortified cities can benefit from by adopting their good practice. A Willingness to Contribute model can be created and implemented and all of the sites in this study that would improve revenue and thus aid in conservation.

Are fortified cities successful in taking advantage of their important resource? No. There are only a few fortified cities in this study that are benefiting from their inherited legacy. A majority of sites in this study are not fully utilizing the potential of this resource.

As shown by the case of Dubrovnik, there is a Willingness to Pay to visit city fortifications and a strong correlation with level of conservation. While visitation is high at this city the management has added value to the experience by offering an alternative way to see the fortifications, city and surroundings. They actively promote walks along the top of the city wall and provide some information concerning conservation. The seemingly high access price has not negatively impacted visitation and most likely limits higher impact traffic. This is duplicated to some extent at Jerusalem & Ávila.

Other fortified cities are not taking full advantage either because they lack the management structure, political barriers or the initial investment required for implementation. To some extent most of the locations in the study offer some price to access certain portions of the fortifications however efforts are fragmented. At nearly all of the sites there were neither intrinsic nor extrinsic contribution efforts and donation boxes with conservation information were nonexistent. Memberships were unavailable and Price Discrimination was only observed in a limited implementation.

5.2. Preliminary Recommendations

A Willingness to Contribute policy could be put into place over time with the following recommendations:

- 1) Conduct studies and visitor surveys to determine the WTP and visitor motivations. This includes collecting reliable visitor statistics.
- 2) Increase in access prices but add value
- 3) Restrict access to vulnerable areas; however explain the reasons for the restrictions
- 4) Avoid simply rebranding WTP as WTC
- 5) Avoid overly commercial activities yet engage with the business community
- 6) Provide opportunities for intrinsic contributions for visitors and users
- 7) Develop opportunities for extrinsic contributions such as books, guides or maps.
- 8) Create Recurrent Opportunities to appeal to the local community. With repeat visits the heritage remains in the public consciousness and additional contributions can be solicited.
- 8) Increase available information about where ticket revenue is spent. It has been proven that the greater the importance given to conservation the higher probably visitors will to donate and the larger amount donated (Bertacchini, 2010).
- 9) Implement price discrimination for foreign visitors, local residents, children and frequent use visitors. However maintain some areas for free access for all groups, especially local residents and school groups.

There is much to learn from this preliminary investigation. WTC can offer an alternative to the stigma of extracting revenue from visitors just because the heritage is there and will reduce the criticism against price discrimination. WTC will add value that enhances the experience and gives visitors the opportunity to participate in conservation. Through enhancing and strengthening intrinsic and extrinsic motivations and by conducting events for repeated visits by the community can these sites be conserved.

5.3. Continuing research

This paper represents only the first step in ongoing research into economic models of self-sustainability for cultural heritage sites including city fortifications. The research will continue further through a widening of the scope to include investigations at other city fortifications and along other lines of inquiry. Investigations will also deepen at selected sites including Famagusta, Cyprus. Limited visitor and community surveys and a determination of WTP at two to three selected sites will be conducted along with further secondary and primary research. The WTC model will continue to be refined through further research. It is also

possible that this model can be tested in a limited way in the long term at one of the sites under study.

Acknowledgements

The authors would like to acknowledge those individuals in the walled cities who participated in this survey and who took the time to answer our questions numerous times. The authors would like to thank David M. Bruce, Academic Adviser, European Walled Towns for friendship and professional cooperation <http://www.walledtownsresearch.org>. In addition thank you must be given to Ana Almagro, Architect for the reading of the text and valuable advice and contributions to this research. Thanks also go to Veronica Bonello at Heritage Malta for her insight and useful advice on the ongoing projects on Malta as well as Caroline Strack-Otakie at the Visitor Centre at the Old City of Akko.

Finally, special thanks are in order for the UNDP PFF programme, the European Union and the Technical Committee for Cultural Heritage in Cyprus for their work to conserve the historic fortifications of Famagusta, Cyprus. They inspired and informed this line of study.

References

- Bález-Montenegro, A., Bedate, A., César Herrero, L., Sanz, J.(s.d.), *Inhabitants' willingness to pay for cultural heritage: a case study in Valdivia, Chile, using contingent valuation*.
- Bedate A., César Herrero, L., Sanz, J.A. (2004) "Economic valuation of the cultural heritage: application to four case studies" in Spain, *Journal of Cultural Heritage* 5, pp. 101–111.
- Bertacchini, E., Santagata, W., Signorello, G. (2010) *Loving Cultural Heritage, Private Individual Giving and Prosocial Behavior*, Nota di Lavoro, Fondazione Eni Enrico Mattei.
- Bonello, Veronica (2015) at Heritage Malta, Conversation on March, 2, 2015.
- Brebbia, C.A., Clark, C., editors, (2009) *Defense Sites II Heritage and Future*, WIT Press.
- Brezovec, T., Bruce, D.M. (2009) *Tourism Development: Issues for Historic Walled Towns Management* 4 (2), pp. 101-114.
- Brezovec, T. (2008) *Tourism Development and Management: Good Practice Guide for the Access and Regeneration of Cultural Heritage in Historic Walled Towns*, ARCHWAY Partnership, Chester City.
- Bruce, D.M. (2015) Interview on March, 5.
- Bruce, D.M. (1993) *Handbook of Good Practice for Sustainable Tourism in Walled Towns, Report of a study into sustainable tourism in walled towns: WTFC Walled Towns Friendship Circle*.
- Bruce, D.M. (1994) "Tourism in Walled Towns" *Tourism Management* 15.3, pp. 228-230.

- Bruce, D.M., Jackson, M.J. and Serra Cantallops, A. (2001) "PREPARE: a model to aid the development of policies for less unsustainable tourism in historic towns" *Tourism and Hospitality Research: the Surrey Quarterly Review* 3.1, pp. 21-36.
- Bruce, D., ARCHWAY partners (2008) *Good Practice Guides to Cultural Heritage Management, Local Transport, Conservation and Spatial Planning in Historic Walled Towns*, published by Chester City Council for INTEREG IIIc. (The www.archway-interreg.com/).
- Collins S., Laban, P. and Lloyd F. (1993) *A Handbook of Good Practice for Sustainable Tourism in Walled Towns - Report to European Commission*, Directorate General XXIII (Tourism) 92/C 51/16.
- Dwyer, L. (2006), International Handbook on the Economics of Tourism, *Visitor Demand and Factors*.
- Lakkhanaadisorn, W. (2013) *A Willingness to Pay Study of Heritage Interpretation: A Case Study of the Historic City of Ayutthaya*, A Dissertation Submitted for the Degree of Doctor of Philosophy.
- Morrison, M., Dowell , D. J. (2013) *Sense of Place and Willingness to Pay: Complementary Concepts When Evaluating Contributions of Cultural Resources to Regional Communities* Regional Studies.
- Mourato, S., Ozdemiroglu, E., Hett, T., and Atkinson, G. (2004) *Pricing Cultural Heritage: A New Approach to Managing Ancient Resources*.
- Mourato and Mazzani, (2002) *Cultural heritage conservation as a fundamental part of cultural policy*.
- Navrud, S. and Ready, R.C. editors, *Valuing Cultural Heritage Applying Environmental Valuation Techniques to Historic Buildings, Monuments and Artifacts*.
- Perbellini, G. ed. (2012) Europa Nostra, *The reuse of ancient fortified settlements from middle ages to early modern time* Europa Nostra Bulletin 65, The Hague, The Netherlands.
- Rizzo, I. and Mignosa, A. (2013) *Handbook on the Economics of Cultural Heritage*. Edward Elgar Publishing Limited.
- Simatovic, Biserka (2015) Dubrovnic Conversation on March 9, 2015, NGO: Dubrovnik Society of Friends of Dubrovnik Antiquities for over 60 years.
- Strack- Otakie, C. (2015) Visitor Center & Reservation ,Old City Akko, Interview on March, '15
- Willis, K.G., (1994) "Paying for heritage: what price for Duram Cathedral?" *Journal of Environmental Planning and Management* Volume 37, Issue 3, pp. 267-278.